



CLEVELAND METROPOLITAN SCHOOL DISTRICT

SUPPLIER SELF SERVICE GUIDE

CMSD PROCUREMENT/PURCHASING DEPARTMENT



JULY 2018

The Supplier Self-Service portal creates a higher level of connectivity for an integrated flow of information between CMSD and our Suppliers.



Contact us:



216.838.0410



SupplierSelfService@clevelandmetroschools.org



Supplier Self Service Portal Overview

The CMSD Supplier Self Service Portal is a free internet accessible Workday enabled self-service tool that allows suppliers to directly access their information during the “procure-to-pay” lifecycle. The portal is available to all CMSD approved suppliers who are registered to use the service.

The Supplier Self Service portal offers the ability to:

- Self-register through an external website
- Receive newly issued purchase orders
- View purchase orders
- Access payment and remittance advice information
- Maintain master data such as contact information, addresses, and bank accounts.
- Create invoices (coming soon)
- Upload catalogs (coming soon)

In addition to the benefits above, the portal is available 24/7 and provides real-time access to invoice and purchase order information.

Effective, August 2018, CMSD will require all approved Suppliers to register and use the Supplier Self Service portal to conduct business with CMSD.

If you are approved and registered, you should have received your login credentials. If you are registered and have not received your login credentials, please contact us at SupplierSelfService@clevelandmetroschools.org.

To get answers to our most frequently asked questions (FAQs) and review our Supplier Self Service Fact Sheet, visit our Supplier Self Service web page at <http://clevelandmetroschools.org/Domain/120>. Select Supplier Self Service from the menu on the left.

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Supplier Self Service Web Site

Website address: <http://clevelandmetroschools.org/Page/13414>

PROCUREMENT /
PURCHASING

Welcome to the Cleveland Metropolitan School District (CMSD) Supplier Self Service Web Page.

The Supplier Self-Service portal creates a higher level of connectivity for an integrated flow of information between CMSD and our Suppliers.



Cleveland Metropolitan School District (CMSD) CMSD Supplier Self Service Portal Supplier Partners

This secure self-service tool offers you the ability to:

- Self-register through an external website.
- View purchase orders.
- Access payment and remittance advice information.
- Maintain master data such as contact information, addresses, and bank accounts.
- Create invoices (coming soon).
- Upload catalogs (coming soon).

START HERE ▼	
Existing Supplier Only	New Supplier Only
Update Contact Information	Register as a New Supplier (Coming Soon)
Supplier Self-Service Portal	

📄 **Terms of Use & Disclaimer**

📄 **CMSD Supplier Fact Sheet**

📄 **Frequently Asked Questions**
Supplier Self Service Frequently Asked Questions

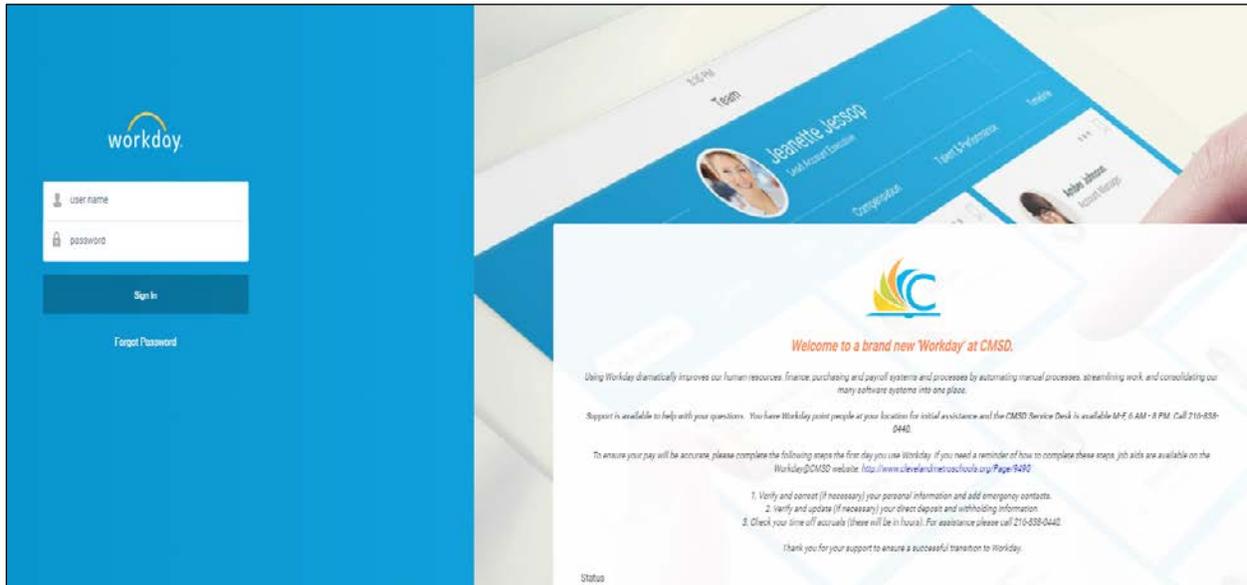
Contact us:

✉ SupplierSelfService@clevelandmetroschools.org

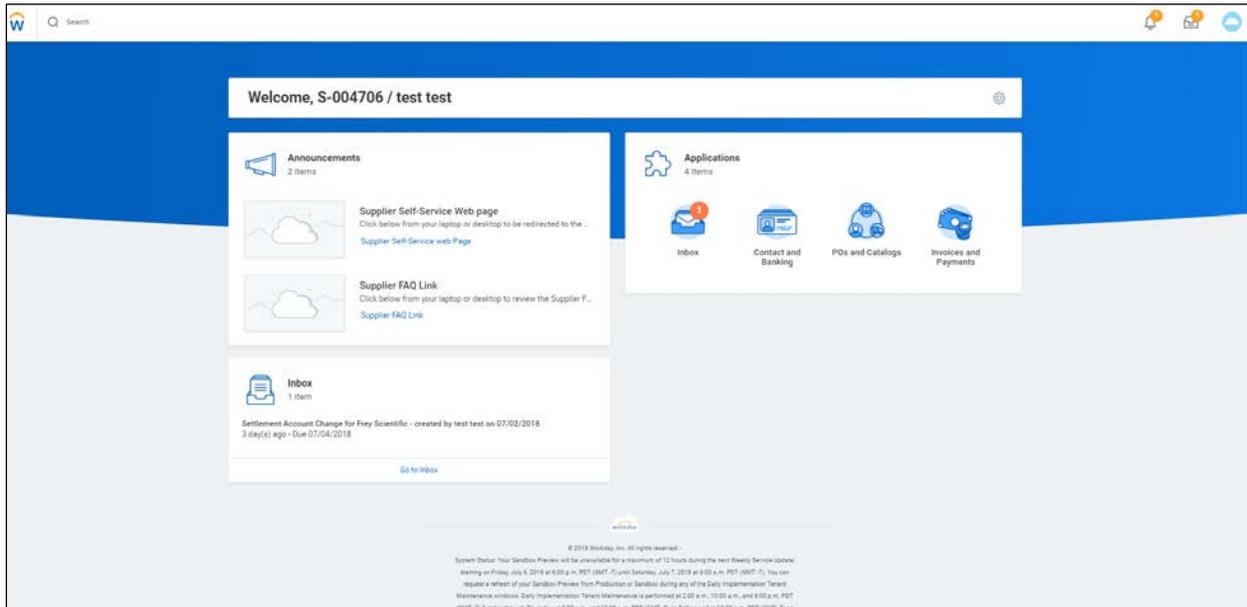
☎ 216.838.0410

Supplier Self Service Portal Login Page

You may access the Self Service Portal using the link in the email from CMSD.



Supplier Self Service Portal Home Page



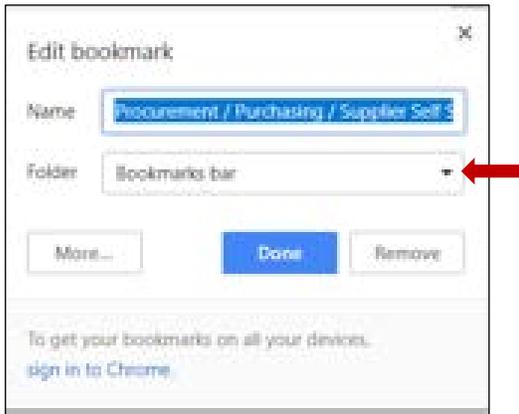
Bookmark a Webpage

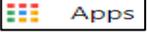
Follow the steps below to bookmark the Supplier Self Service webpage and the CMSD Supplier Portal login page.

INSTRUCTIONS

NOTE: To bookmark a webpage, make sure you are on the open webpage

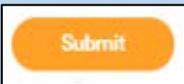
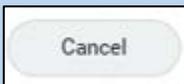
- Click  in the upper right corner of the screen. Scroll down and click **Bookmarks**.
- Click **Bookmark this page** to display the **Edit Bookmark** box (see below)



- Type **the name of the webpage you want to bookmark** next to name
- Click the ▼ on the right of **Folder** and click Bookmark Bar or select a folder you've created
- If you chose Bookmark Bar, the bookmarked page will appear on the same row as  or in your designated folder.
- If you have many items on your Bookmark Bar, you may need to scroll right using the  in the top right of the screen.

Self Service Portal Tools

	Perform document search
	Notifications to take action
	Configure the page you're viewing or refresh information
	Filter information on the report
	Select Column preference for report
	Create/expand/collapse chart
	Displays additional actions/details
	Scroll left or right
	Scroll up or down
	Inbox

	Return to the homepage
	Preference menu/sign out option
	Return toggle to normal view
	Toggle to full screen view
	Print document
	Export to Excel
	Configure/view chart
	Search menu options
 	Accept the transaction or entry and proceed to the next step
	Save the current entries to allow updates later
	Cancel the transaction or entry

Inbox Application

Purpose: The purpose of this Application is to enable suppliers to receive Workday messages, actions items and view archived transactions that have been completed within the Inbox.

How to Access: The inbox can be accessed from the Workday homepage.

Audience: CMSD Approved Suppliers

Helpful Hints: You will need to be registered as a CMSD Supplier and have access credentials in order to log in to the Supplier Portal.

Procedure: Complete the following steps to understand the use of the Inbox application and the different Dashboards.

The homepage offers three ways to access the inbox.

1. On the bottom of the left side of the screen. Messages can be accessed by clicking

[Go to Inbox](#)

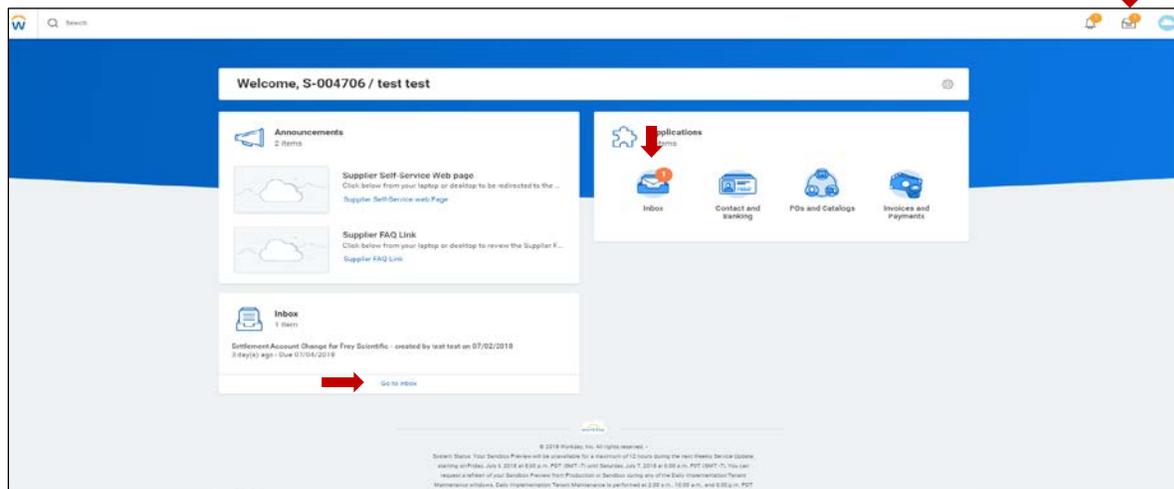
2. On the right side of the screen under Applications



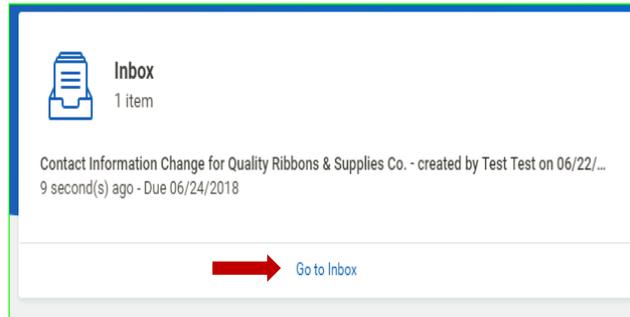
3. On the top right side of the screen



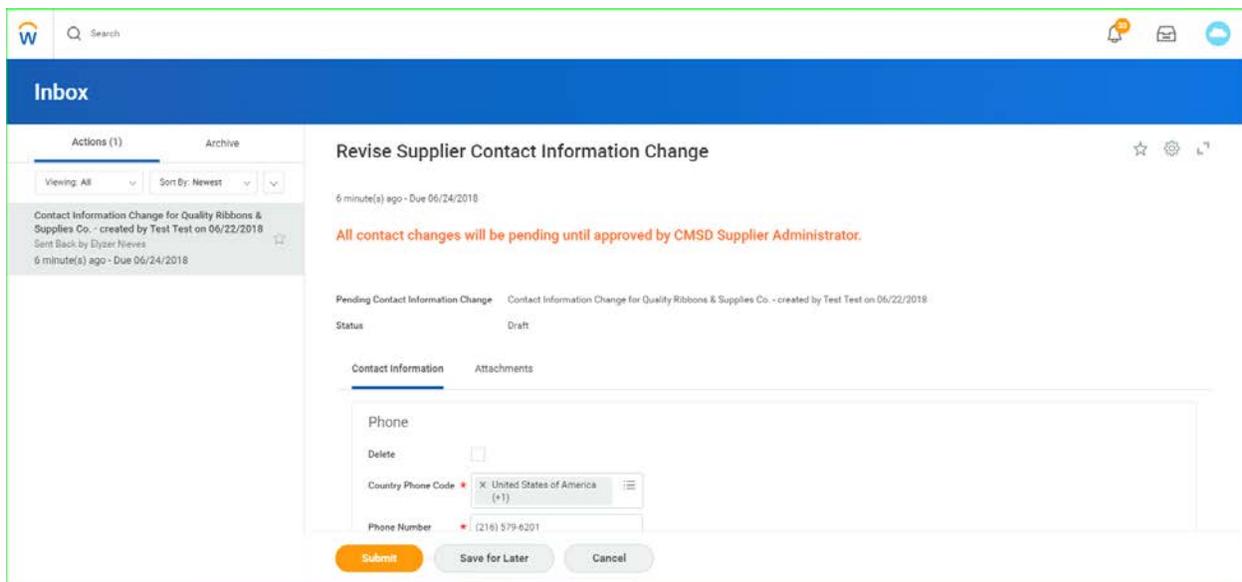
These options are shown on the next page.



The inbox on the left side of the screen will show the 3 most current messages. These messages are designed to alert you that action is needed on pending transactions. See below.

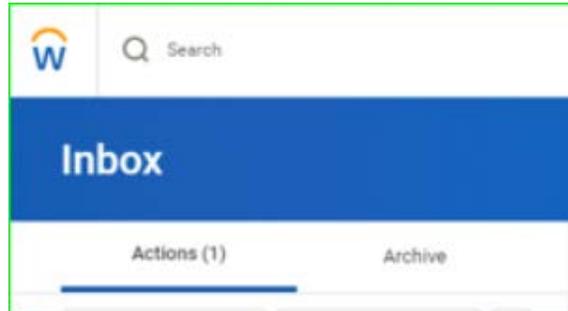


Click [Go to Inbox](#) to review pending items. As shown in the next illustration, Action and Archive items will be displayed. To view the details, click the Action or Archive tab.



Helpful Hint: You can also use the  or  icons to open the Inbox page below.

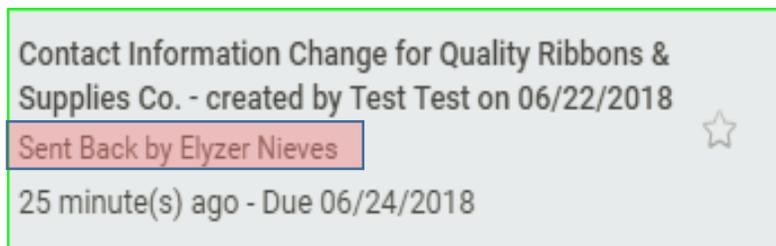
Once the Inbox page is open you will see 2 tabs:



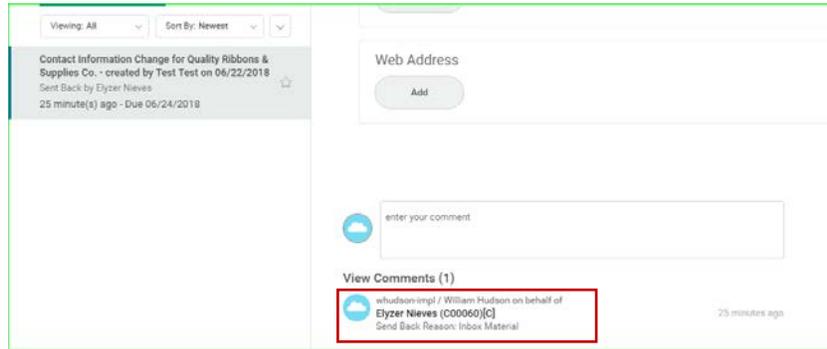
Tab	Description
Actions	Displays incomplete business process tasks, approvals, and To Dos in chronological order.
Archive	Displays business process tasks and actions completed. The system default displays tasks and actions for the last 30 days. To see additional items, follow the steps listed under Archive Tab on page 13.

Actions Tab

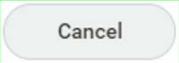
Once there is pending action you are now ready to review what action is required. In the next example we see that a previous change request has been sent back in the red box.



On the right side scroll down the page to review the comments from the Approver. These comments will identify actions you will need to take.



Task Actions

Task Actions	Description
	If the icon Save for Later is selected, it will save the changes and they can be picked up at a later time to complete all the pending edits and submit for approval at a later time.
	If the icon Cancel is selected, you will go back to the menu screen without saving any data.
	If the icon Submit is selected, it will trigger the actual changes for the Supplier Administrator to review, update, approve or cancel the corresponding change request.
	Once a process has been submitted you can press Done to go back to the Inbox.

Success! Event submitted 📄 🖨️

Contact Information Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/22/2018 (Actions)

25 minute(s) ago - Due 06/24/2018

Up Next

Supplier Administrator

Approval by Supplier Administrator

Due Date 06/24/2018

Do Another

[Change Supplier Contact Information](#)

Details and Process

For Quality Ribbons & Supplies Co.

Overall Process [Contact Information Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/22/2018](#)

Overall Status In Progress

Due Date 06/24/2018

[Details](#)

[Process](#)

[Done](#)

Contact Information Change Event [Contact Information Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/22/2018](#)

Click  to return to the inbox.

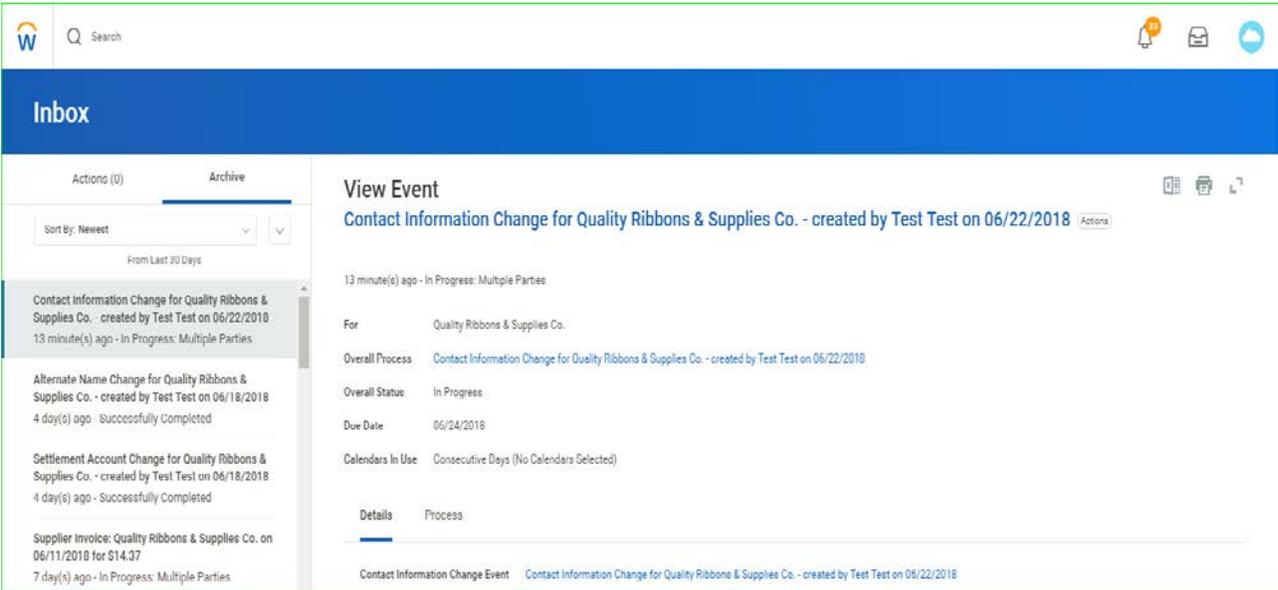
Once you have taken action on any messages, your Inbox Application will clear out showing that you don't have any pending actions. You have the option to see all transactions on the Archive Tab (details below).

Helpful Hint: Submitting a transaction will come back with the final status from the approver that could be: Denied, Sent Back for update or Approved.

Archive Tab

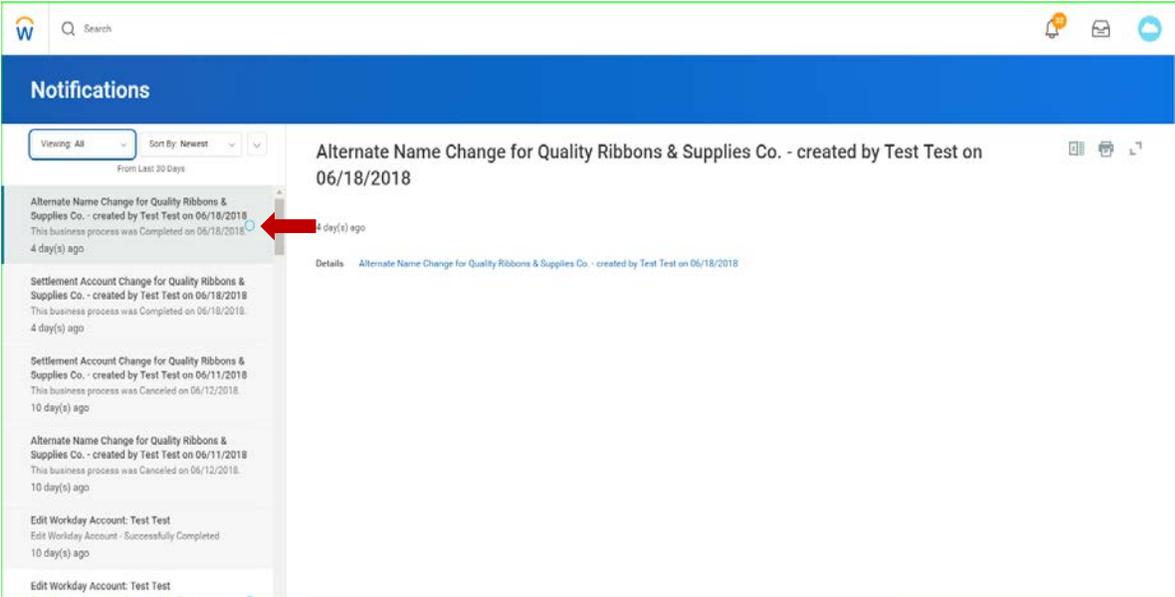
On the Archive Tab below you will see the review history of all the actions that have been taken within your Inbox.

The Archive tab displays completed action items for 30 days from the initiated request date. To view archived items older than 30 days, perform the following steps: Click the down arrow and select "View More Processes". When the "View More Processes" screen is displayed, enter the "Start Date" and "End Date", and then click OK.



Notifications

Notifications are used to keep you informed of activity related to your account. These are typically items that you need to know about but don't require action. In the example below, the  **Notifications** icon was selected. Unread notifications will have a circle  next to them. The circle will disappear once the notification is selected.



Contact and Banking Application

Purpose: The purpose of this Application is to enable suppliers to maintain or view their supplier data, such as addresses and settlement banking information, and to submit their own updates.

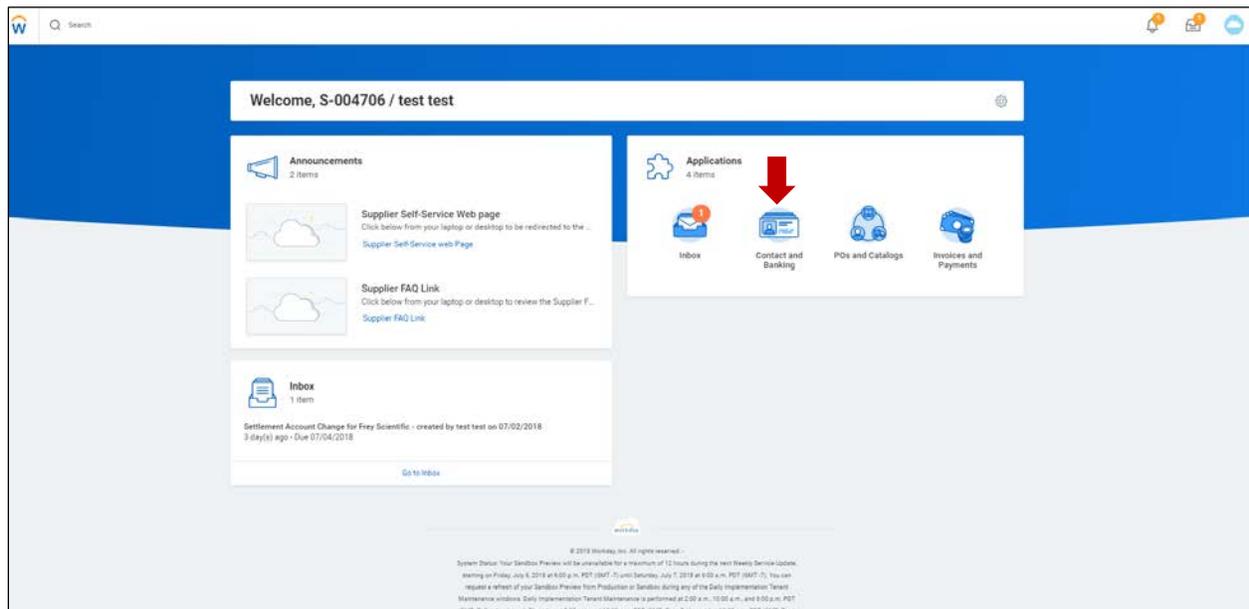
How to Access: Go to the CMSD supplier portal home page, select the **Contact and Banking** icon under the **Applications** section.

Audience: CMSD Approved Suppliers

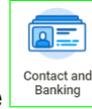
Helpful Hints: You will need to be registered as a supplier contact and need to have access credentials in order to log in to the Supplier Portal.

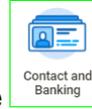
Procedure: Complete the following steps to understand the use of the Application and the different Dashboards.

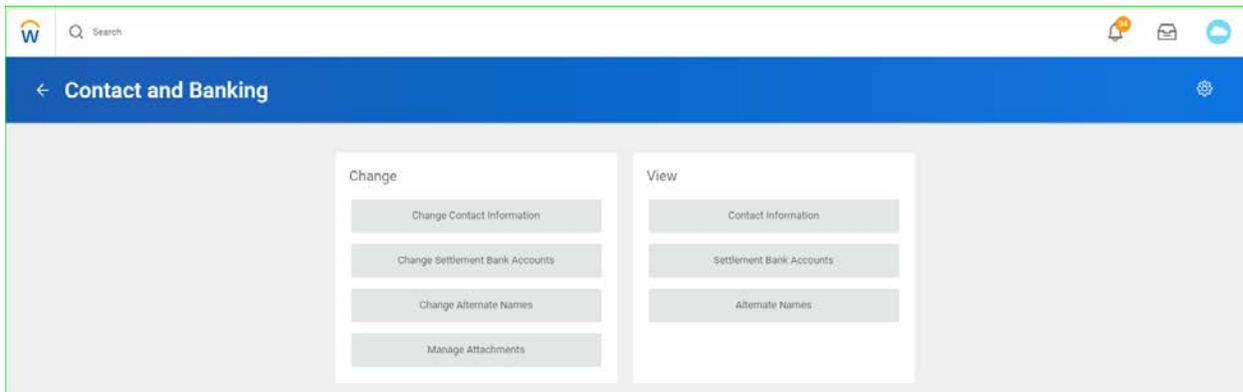
Once you log in to the supplier portal you will see the next home page where you will be able to apply different actions by selecting specific Applications like: Inbox, Contact and Banking, Invoices and Payments, and PO's and Catalogs.



Contact and Banking Application



To access the Contact and Banking application click the  icon. Once selected a new dashboard page will open.



The dashboard is divided into two sections:

Change will allow you to maintain and update your company information. An internal approval process will be triggered if you initiate and submit a change of information.

Task	Description
Change Supplier Contact Information	Submit new and updated supplier contact information for review and approval.
Change Supplier Settlement Bank Account	Submit new, and updated supplier settlement bank accounts for review and approval.
Change Supplier Alternate Name	Submit new and updated supplier alternate names for review and approval.

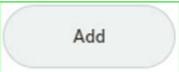
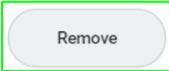
Manage Attachments	Upload multiple type of files related to the information provided.
--------------------	--

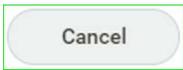
The second option **View** will just allow the supplier contact user to see the existing data on “view mode”.

Change

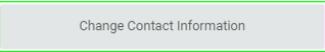
Task Actions for Change Request:

Below you will find the list of task actions possible and a brief description on what each action will trigger within a change request.

Task Actions	Description
	Before any change can be made a confirmation message will pop up and will need to be confirmed to start the draft Change by selecting the OK icon.
Delete <input type="checkbox"/>	If the Delete box is checked, the existing record type where selected will be deleted once the transaction is fully approved once submitted.
	If the Icon Add is selected, it will open up a new section based on the selection type to include a new record to the supplier data.
	If the Icon Remove is selected, it will remove the record you just inserted by selecting the Add action above.
	If the Icon Save for Later is selected, it will save the changes and they can be picked up at a later time to complete all the pending edits and submit for approval at a later time.

	<p>If the Icon Cancel is selected, it will just take you back to the menu screen without saving any data.</p>
	<p>If the Icon Submit is selected, it will trigger the actual changes for the Supplier Administrator to review, update, approve or cancel the corresponding change request.</p>

Change Contact Information

Select the icon  below you will find what information can be updated with this task.

1. Phone

Phone

Delete

Country Phone Code *

Phone Number *

Phone Extension

Phone Device *

Type *

Primary

Use For

Visibility Public

Comments

Field	Required/Optional
Country Phone Code	Required
Phone Number	Required
Phone Extension	Optional

Phone Device	Required
Type	Business (Default)
Primary	At least one must be Primary
Use For	Billing Remit To (See helpful hint below) Shipping
Visibility	Required
Comments	Optional

Address

Address

Delete

Effective Date * 01 / 01 / 1980

Country *

Address Line 1 *

Address Line 2

City *

State *

Postal Code *

County

Usage

Type * Business

Primary

Use For
 Remit To

Visibility Public

Comments

Helpful Hint: Please DO NOT remove old addresses. CMSD has opted to retain all account history. If your address has changed, please **Add** the new address with a new effective date.

Field	Required/Optional
Effective Date	Required
Country	Required
Address Line 1	Required
Address Line 2	Optional
City	Required
State	Required
Postal Code	Required
County	Optional
Type	Business (Default)
Primary	At least one must be Primary we suggest selecting the most effective dated one.
Use For	Select one or all that apply
Visibility	Required
Comments	Optional

Email

Email

Delete

Email Address * wd.testomsd2@gmail.com

Type * Business

Primary

Use For Billing Remit To Shipping

Visibility Public

Comments

Field	Required/Optional
Email Address	Required
Type	Business (Default)
Primary	At least one must be Primary
Use For	Select one or all that apply
Visibility	Required
Comments	Optional

Instant Messenger

Instant Messenger

User Name *

Provider * select one

Type * Business

Primary

Use For (empty)

Visibility Public

Comments

Field	Required/Optional
User Name	Required
Provider	Required
Type	Business (Default)
Primary	At least one must be Primary
Use For	(empty)
Visibility	Required

Comments	Optional
----------	----------

Web Address

Web Address

URL Address *

Type Business

Primary

Use For Shipping

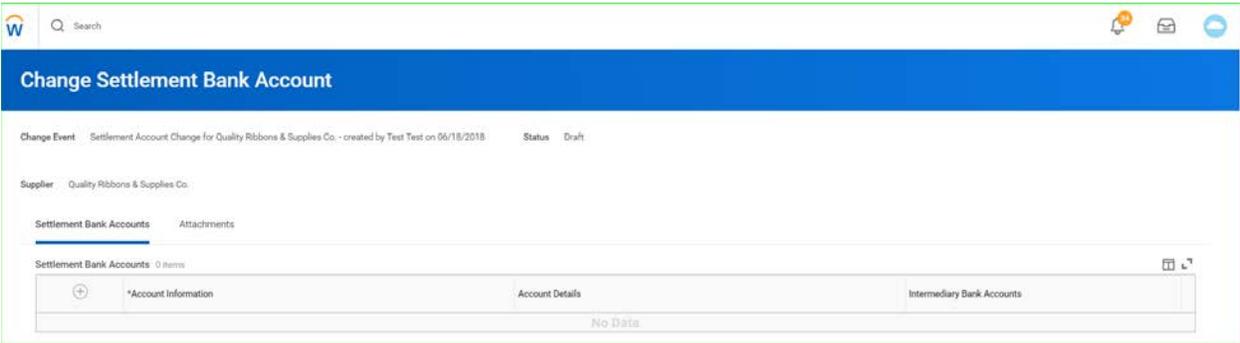
Visibility Public

Comments

Field	Required/Optional
URL Address	Required
Type	Business (Default)
Primary	At least one must be Primary
Use For	Select one or all that apply
Visibility	Required
Comments	Optional

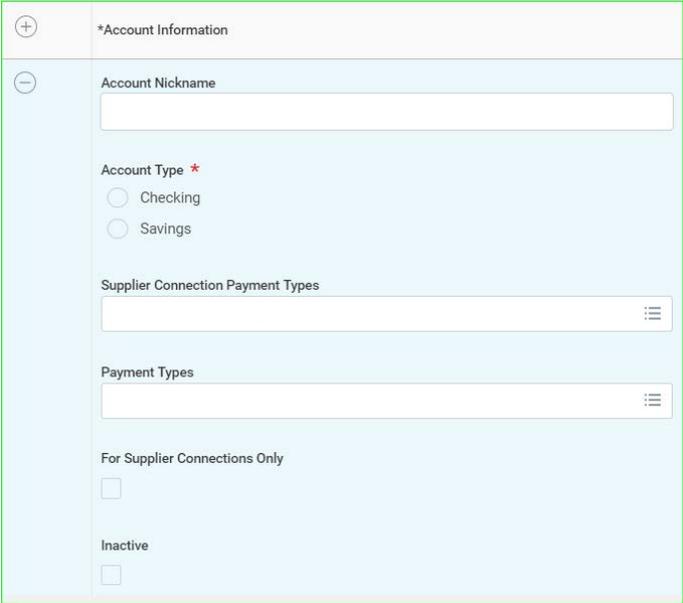
Change Settlement Bank Accounts

Select the icon  below you will find what information can be added or updated with this task.



We are going to select the  icon in order to insert a Settlement Bank Account.

Settlement Account Information



Field	Required/Optional
Account Nickname	Required
Account Type	One required
Supplier Connection Payment Types	Do Not Use

Payment Types	Select one or all that apply
For Supplier Connections Only Box	Do Not Use

Settlement Account Details

Account Details

Country *

Bank Name

Branch Code

Branch Name

Bank Code

Account Number

Check Digit

Name On Account

Roll Number

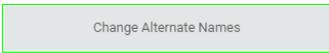
IBAN

Bank Identification Code

Bank Instructions

Field	Required/Optional
Country	Required
Bank Name	Required
Branch Code	Optional
Branch Name	Optional
Bank Code	Required
Account Number	Required
Check Digit	Optional
Name on Account	Optional
Roll Number	Optional
IBAN	Optional
Bank Identification Code	Optional
Bank Instructions	Optional

Change Alternate Names

Select the icon  below you will find what information can be updated with this task.

Select the  icon in order to insert a new Alternate Name.

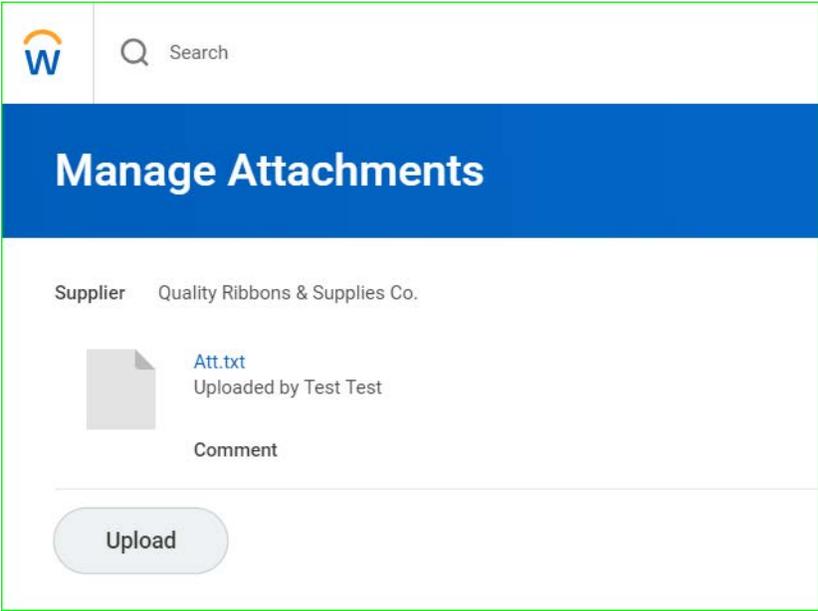


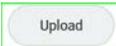
The screenshot shows a light blue form interface. On the left side, there is a minus sign icon (-). In the center, there is a text input field labeled "Name" with a red asterisk (*) indicating it is required. To the right of the input field, there is a plus sign icon (+) and a small menu icon (three horizontal lines).

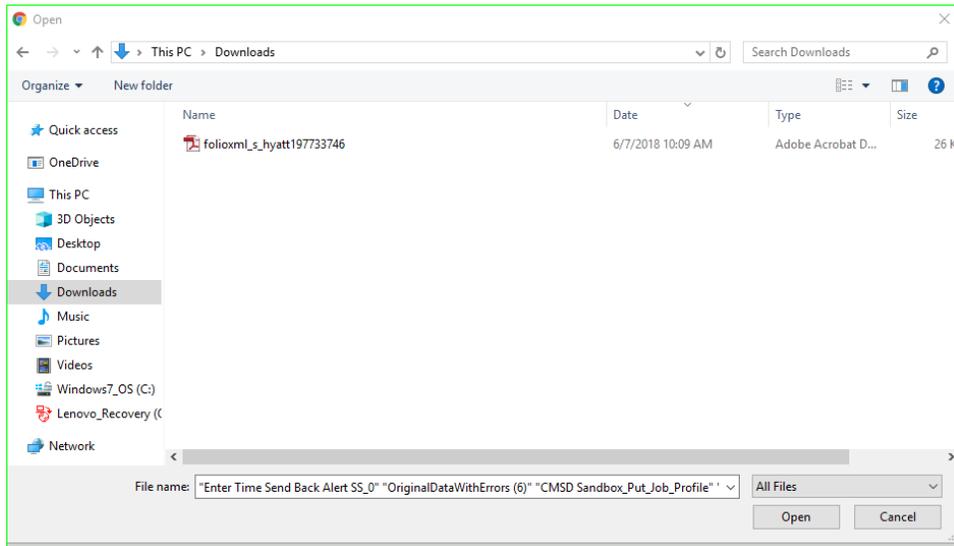
Field	Required/Optional
Name	Required
Usage	Select 1099 MISC Recipient and any other that may apply

Manage Attachments

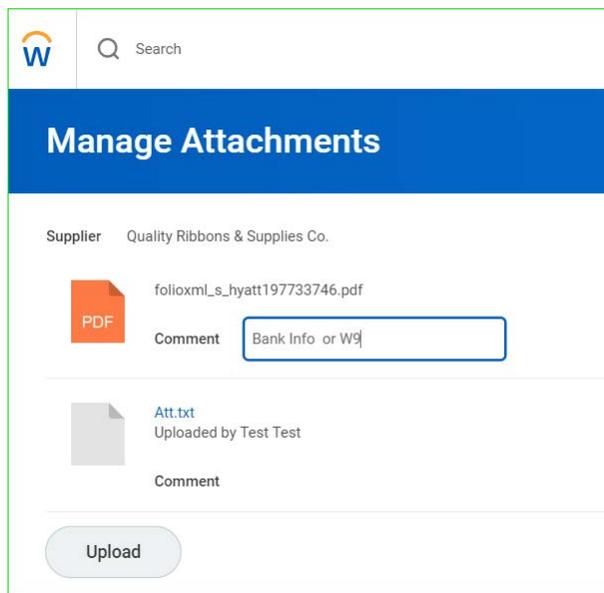
Select the icon  below you will find what information can be updated with this task.



You will only have the ability to use the upload task to include additional attachments by selecting the  icon which will open your local file location to allow you to select the files you want to upload.



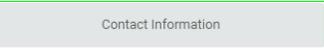
Once selected, click **Open** and the file will show on the Manage Attachments page along with a brief description of the file...

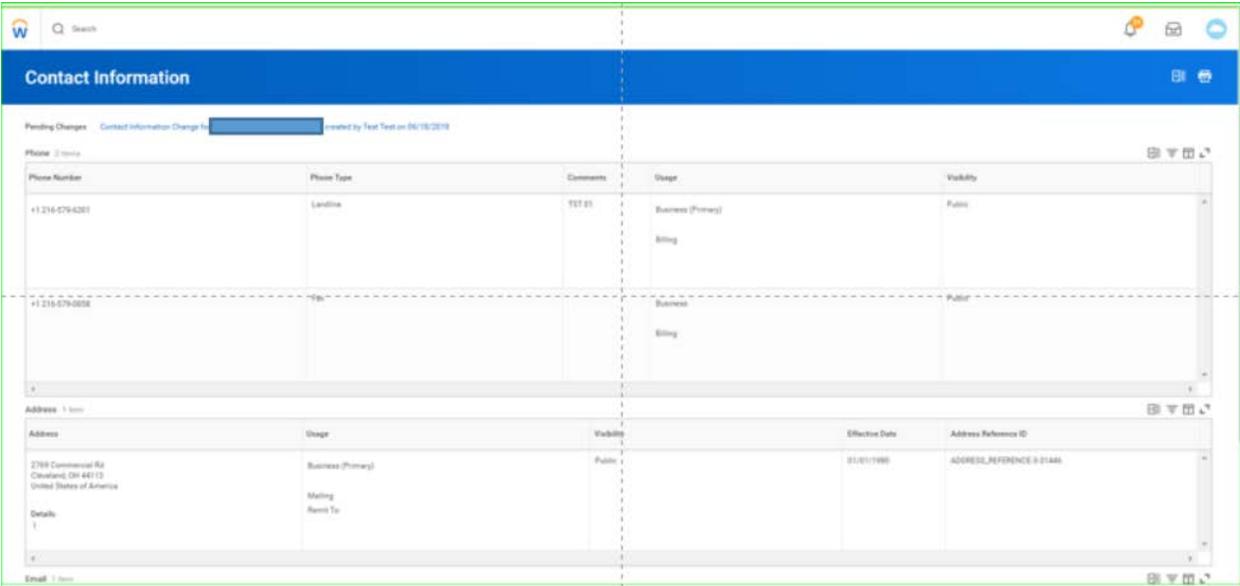


If necessary, you may add more files by repeating the Manage Attachment steps.

View

Contact Information

Select the icon  below you will find what information can be viewed with this task.

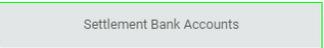


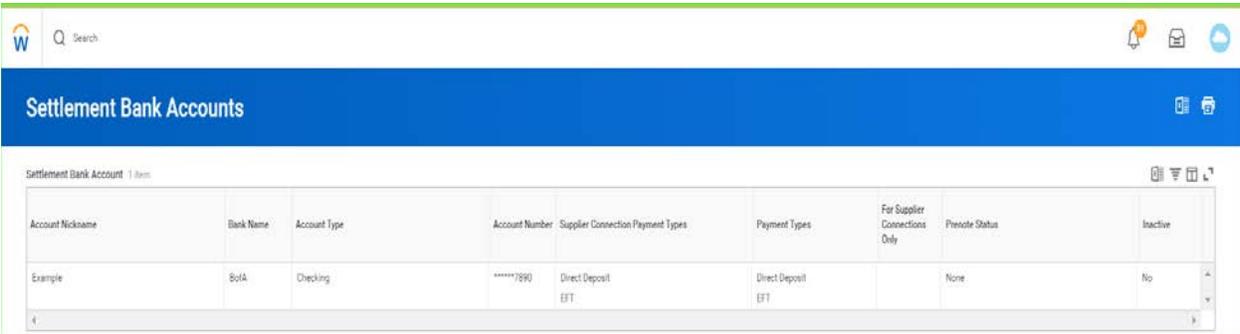
The screenshot shows a web interface for 'Contact Information'. It includes a search bar, a title bar, and two main data tables. The first table is for phone numbers, and the second is for addresses.

Phone Number	Phone Type	Comments	Usage	Visibility
+1 216-579-6281	Landline	TST 01	Business (Primary) Billing	Public
+1 216-579-6288	Cell		Business Billing	Public

Address	Usage	Visibility	Effective Date	Address Reference ID
2788 Commercial Rd Cleveland, OH 44113 United States of America	Business (Primary) Mailing Remit To	Public	01/01/1998	ADDRESS_REFERENCE-0-01446

Settlement Bank Accounts

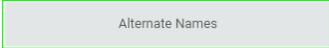
Select the icon  below you will find what information can be viewed with this task.

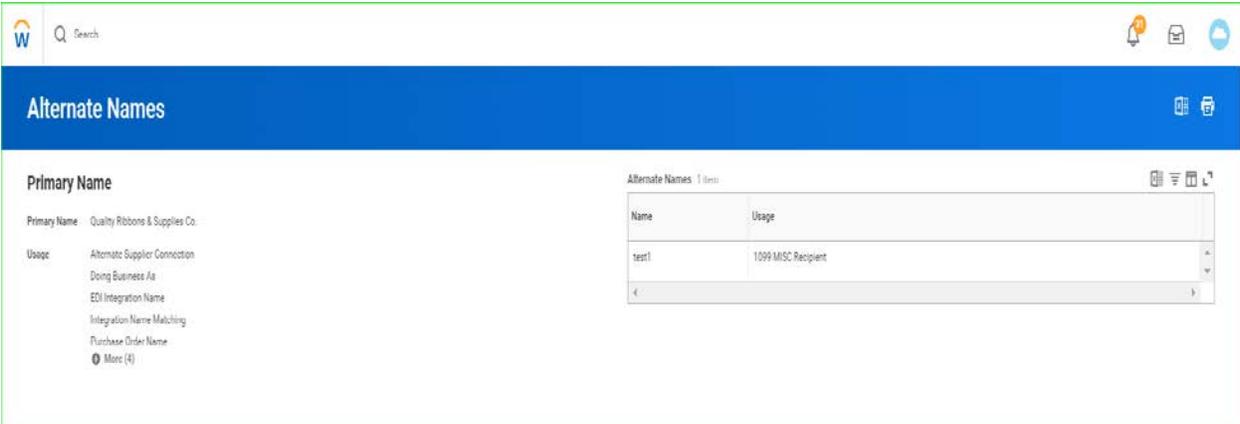


The screenshot shows a web interface for 'Settlement Bank Accounts'. It includes a search bar, a title bar, and a table with account details.

Account Nickname	Bank Name	Account Type	Account Number	Supplier Connection Payment Types	Payment Types	For Supplier Connections Only	Prenote Status	Inactive
Example	BoFA	Checking	*****7890	Direct Deposit EFT	Direct Deposit EFT		None	No

Alternate Names

Select the icon  below you will find what information can be viewed with this task.



The screenshot shows a software interface for managing alternate names. At the top, there is a search bar and navigation icons. Below the search bar is a blue header with the text 'Alternate Names' and a refresh icon. The main content area is divided into two sections:

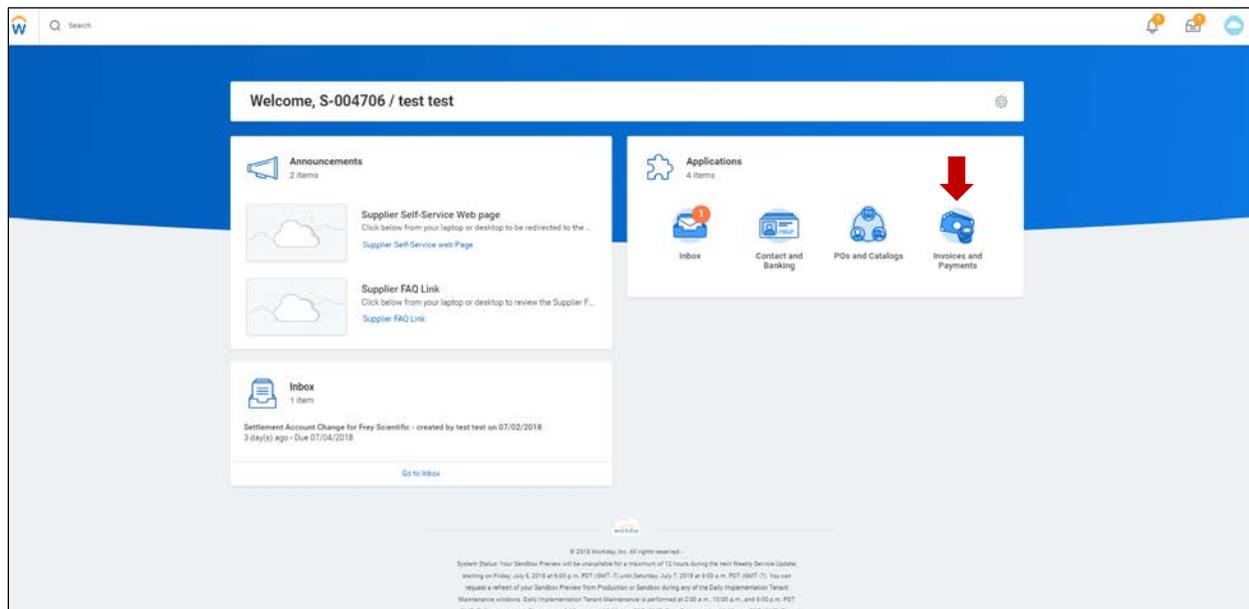
- Primary Name:** A section with a label 'Primary Name' and a value 'Quality Ribbons & Supplies Co.' Below this, there is a 'Usage' section with a list of categories: 'Alternate Supplier Connection', 'Doing Business As', 'EDI Integration Name', 'Integration Name Matching', 'Purchase Order Name', and 'More (4)'.
- Alternate Names Table:** A table with the title 'Alternate Names | 1 Item'. It has two columns: 'Name' and 'Usage'. The table contains one row with the value 'test1' in the 'Name' column and '1099-MISC Recipient' in the 'Usage' column.

Invoices and Payments Application

- Purpose:** To provide instructions for viewing and searching most recent invoices and payments.
- How to Access:** Log into the Supplier Self Service Portal and click **Invoices & Payments** on your under the Applications section of the home page.
- Audience:** CMSD Approved Suppliers
- Helpful Hints:** Clicking on the [blue](#) text on any screen will return additional information.
- Procedure:** Follow the steps below to view and search invoices and payments.

Invoices and Payments

Invoices and Payments can be accessed from your Supplier Self Service Portal home page. This application allows you to view the details for **most recent payments** and **most recent invoices**.



Most Recent Payments

Most Recent Payments details include payment amount, payment date, transaction reference, and the number of invoices included in the payment while

Most Recent Payments 						
Payment	View	Payment Amount	Currency	Payment Date	Transaction Reference	Invoices
Supplier Payment Contract & Commercial Customer Id: 1065558DET: 02/23/2018	View 	17.82	USD	02/23/2018		1 
Supplier Payment Contract & Commercial Customer Id: 1065558DET: 02/08/2018	View	356.76	USD	02/08/2018	1009967 (Check)	5 
Supplier Payment Contract & Commercial Customer Id: 1065558DET: 02/01/2018	View	909.78	USD	02/01/2018	1009593 (Check)	3
Supplier Payment: Contract & Commercial Customer Id: 1065558DET: 01/25/2018	View	11.78	USD	01/25/2018	1009125 (Check)	1

 [View More Details...](#)

Clicking **View More Details** (in blue above) in the bottom left corner of Most Recent Payments will allow you to perform detailed searches using the selection fields below. This option allows customized searches to fit your needs.

Find Payments for Supplier Contact

Payment Date On or After

Payment Date On or Before

Payment Types

Payment Status

Payment Currency

Payment Amount Equal To

Payment Amount Greater Than

Payment Amount Less Than

Supplier Reference Number

Transaction Reference

Indicates availability of a search menu.
See search options in the table below.



Search menu options:

Selection Options	Options
Payment Types	Cash, Check, Credit Card, Debit Card, Direct Debit, Direct Deposit, EFT, Manual, Wire
Payment Status	Approved, Awaiting Payment Acknowledgement, Awaiting Settlement, Canceled, Complete, Draft, Escheated, In Progress, Payment Received, Rejected, Returned, Stopped, Unapplied
Payment Currency	Generally USD but other currency selections are available

Clicking **View** in the second column of the Most Recent Payments table returns payment details for each invoice included in the payment. The example below is the results of clicking **View** for the payment in the amount of \$356.76 which includes five invoices.

W Search

View Payment for Supplier Contact

Supplier Payment: Supplier Payment: Staples Contract & Commercial Customer ID: 106558DEET, 02/08/2018 Status: Complete Reconciliation Status: Unreconciled

Payment Information

Company: Cleveland Metropolitan School District

Payee: Staples Contract & Commercial Customer ID: 106558DEET

Payment Date: 02/08/2018

Payment Amount: 356.76

Currency: USD

Memo: (empty)

Payment Detail

Bank Account: Key Bank - Accounts Payable Checking 3160

Payment Type: Check

Transaction Reference: 1009967

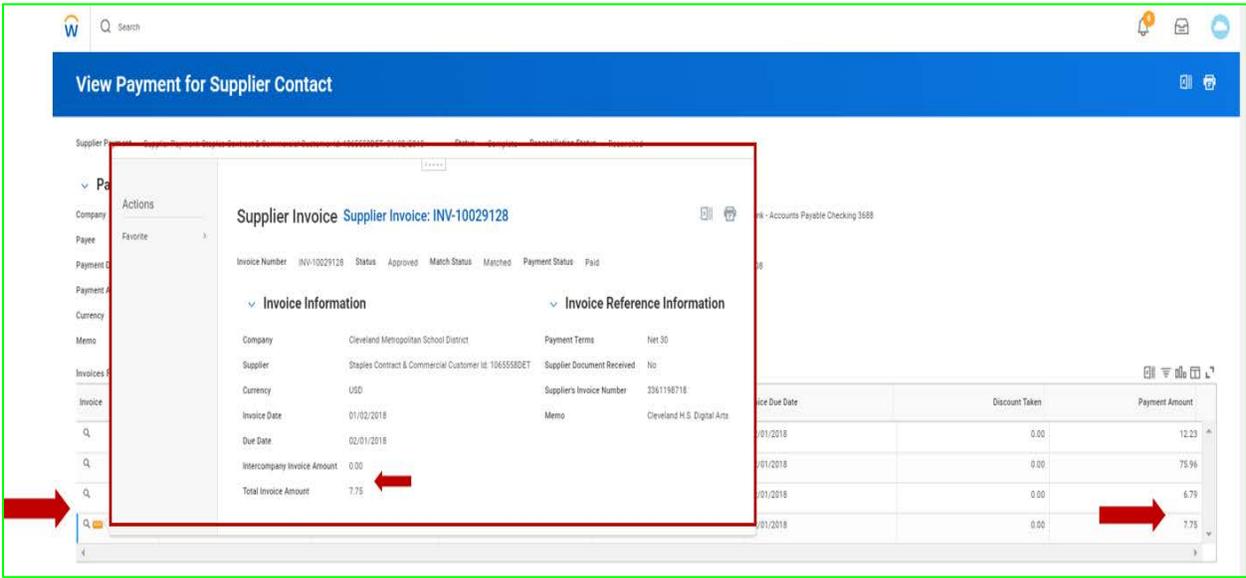
Invoices Paid: 5 items

Invoice	Invoice Date	Supplier's Invoice Number	Invoice Amount	Discount Due Date	Invoice Due Date	Discount Taken	Payment Amount
Q	02/08/2018	3368261428	19.19		03/10/2018	0.00	19.19
Q	02/08/2018	3368261429	602.15		03/10/2018	0.00	602.15
...	02/08/2018	3367231078	(319.00)		03/10/2018	0.00	(319.00)
Q	02/07/2018	3368197016	22.43		03/09/2018	0.00	22.43
Q	02/07/2018	3368197014	31.99		03/09/2018	0.00	31.99



Report features found in the top right of the report table allows you to export to Excel, filter data, create graphs, view/edit grid preferences, and toggle to full

As shown below, additional invoice details can be obtained by placing the cursor to the right of the magnifying glass and clicking on the yellow Twinkie (). A pop-up window will display additional details.



View Payment for Supplier Contact

Supplier Invoice: INV-10029128

Company: Cleveland Metropolitan School District

Supplier: Staples Contract & Commercial Customer Id: 1065558DE7

Currency: USD

Invoice Date: 01/02/2018

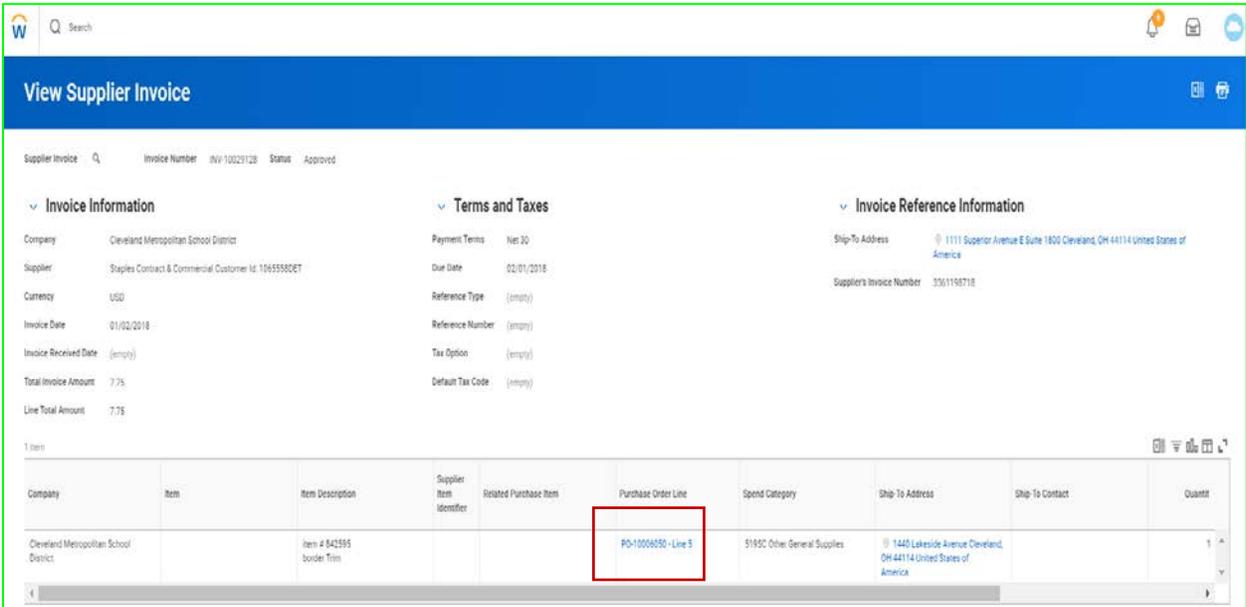
Due Date: 02/01/2018

Intercompany Invoice Amount: 0.00

Total Invoice Amount: 7.75

Invoice Due Date	Discount Taken	Payment Amount
01/2018	0.00	12.23
01/2018	0.00	75.96
01/2018	0.00	6.79
01/2018	0.00	7.75

Clicking directly on the magnifying glass will return the results shown below.



View Supplier Invoice

Supplier Invoice: INV-10029128 Status: Approved

Invoice Information

Company: Cleveland Metropolitan School District

Supplier: Staples Contract & Commercial Customer Id: 1065558DE7

Currency: USD

Invoice Date: 01/02/2018

Invoice Received Date: (empty)

Total Invoice Amount: 7.75

Line Total Amount: 7.75

Terms and Taxes

Payment Terms: Net 30

Due Date: 02/01/2018

Reference Type: (empty)

Reference Number: (empty)

Tax Option: (empty)

Default Tax Code: (empty)

Invoice Reference Information

Ship-To Address: 1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America

Supplier's Invoice Number: 3361198718

Company	Item	Item Description	Supplier Item Identifier	Related Purchase Item	Purchase Order Line	Spend Category	Ship To Address	Ship To Contact	Quantity
Cleveland Metropolitan School District		Item # 842595 border Trim			PO-10006050 - Line 5	5195C Other: General Supplies	1440 Lakeside Avenue Cleveland, OH 44114 United States of America		1

Line item detail can be displayed by clicking directly on the **blue text** under Purchase Order Line (see above). The results are shown below.

View Goods Order Line

Goods Order Line: Q
 Line: S
 Purchase Order: PO-10006050
 Supplier: Staples Contract & Commercial Customer ID: 1065550DET
 Item: (empty)
 Spend Category: S195C Other General Supplies
 Tax Applicability: (empty)
 Tax Code: (empty)

Tax Recoverability

Quantity: 1
 Unit of Measure: Bundle
 Unit Cost: 14.99
 Extended Amount: 14.99
 Currency: USD
 Prepaid: (empty)
 Ship-To Address: 1440 Lakeside Avenue Cleveland, OH 44114 United States of America
 Ship-To Contact: (empty)

Receipts | Invoices

Receipts: 1 Item

Receipt	Quantity Received	Received UOM	Quantity Ordered	Ordered UOM
REC-0020294 for PO-10006050	1	Bundle	1	Bundle
Total:			1	Bundle

Most Recent Invoices

This report provides the list of your most recent invoices. Details for most recent invoices include invoice: number, amount, due date, status and payment status.

Most Recent Invoices

Invoice	Supplier Reference Number	Total Invoice Amount	Currency	Due Date	Invoice Status	Payment Status
INV-10035972	TEST001	267.91	USD	07/11/2018	In Progress	Unpaid
INV-10035977		0.00	USD	02/11/2018	Canceled	
INV-10035979	3368234958	17.82	USD	02/11/2018	Approved	Paid
INV-10035986	3368261429	602.15	USD	02/10/2018	Approved	Paid
INV-10035988	3368261428	19.19	USD	02/10/2018	Approved	Paid
INV-10035611	3367231078	(219.00)	USD	02/10/2018	Approved	Paid
INV-10035364	3368197014	31.99	USD	02/09/2018	Approved	Paid
INV-10035365	3368197015	22.42	USD	02/09/2018	Approved	Paid
INV-10035366	3368197016	72.98	USD	02/09/2018	Approved	Unpaid
INV-10034226	3366276947	110.79	USD	02/02/2018	Approved	Paid

[View More Details](#)

To see the details related to a given invoice, click on the invoice number (in blue text) in the column titled Invoice. A sample of the results is shown below.

View Supplier Invoice

Supplier Invoice Invoice Number INV-1003970 Status Draft

Invoice Information

Company Cleveland Metropolitan School District

Supplier Office Depot Acct. 10798088

Currency USD

Invoice Date 06/11/2018

Invoice Received Date (empty)

Total Invoice Amount 30.00

Line Total Amount 30.00

Terms and Taxes

Payment Terms Net 30

Due Date 07/11/2018

Reference Type (empty)

Reference Number (empty)

Tax Option (empty)

Default Tax Code (empty)

Invoice Reference Information

Ship-to Address 1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America

Supplier's Invoice Number 5878886

1 Item

Company	Item	Item Description	Supplier Item Identifier	Related Purchase Item	Purchase Order Line	Spend Category	Ship-To Address	Ship-To Contact	Quantity	Unit of Measure
Cleveland Metropolitan School District		Delivery Charge			PO-0303021 - Line 1	5123C Office Supplies	1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America		1	Each

To review the line item details, click the blue text under Purchase Order Line. See example below.

View Goods Order Line

Goods Order Line Line 1

Purchase Order PO-0303021

Supplier Office Depot - Acct. 10798088

Item (empty)

Spend Category 5123C Office Supplies

Tax Applicability (empty)

Tax Code (empty)

Tax Recoverability

Quantity 1

Unit of Measure Each

Unit Cost 30.00

Extended Amount 30.00

Currency USD

Prepaid

Ship-To Address 1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America

Ship-To Contact (empty)

Receipts Invoices

Receipts 1 Item

Receipt	Quantity Received	Received UOM	Quantity Ordered	Ordered UOM
LEGACY-0303021-1 for PO-0303021	1	Each	1	Each
Total:			1	Each

If you don't see the invoice you want, click **View More Details** on the bottom left of the report to open the **Find Invoices for Supplier Contract** box. This feature allows you to search for

invoices based on due dates, invoice number, supplier reference number, and invoice or payment status.



Enter your search criteria and click  to continue the search or  to discontinue the search. Not all fields are required to complete a search. You can customize the search based on your needs.



Search menu options:

Selection Criteria	Options
Invoice Status	Approved, Canceled, Denied, Draft, Incomplete, In Progress
Payment Status	Paid, Partially Paid, Unpaid

Find Purchase Orders

This feature allows you to search for a purchase order based on date or purchase order number. To perform a search enter the date range or purchase order number and click  to continue or  to stop the search.



W Search

Find Purchase Orders for Supplier Contact

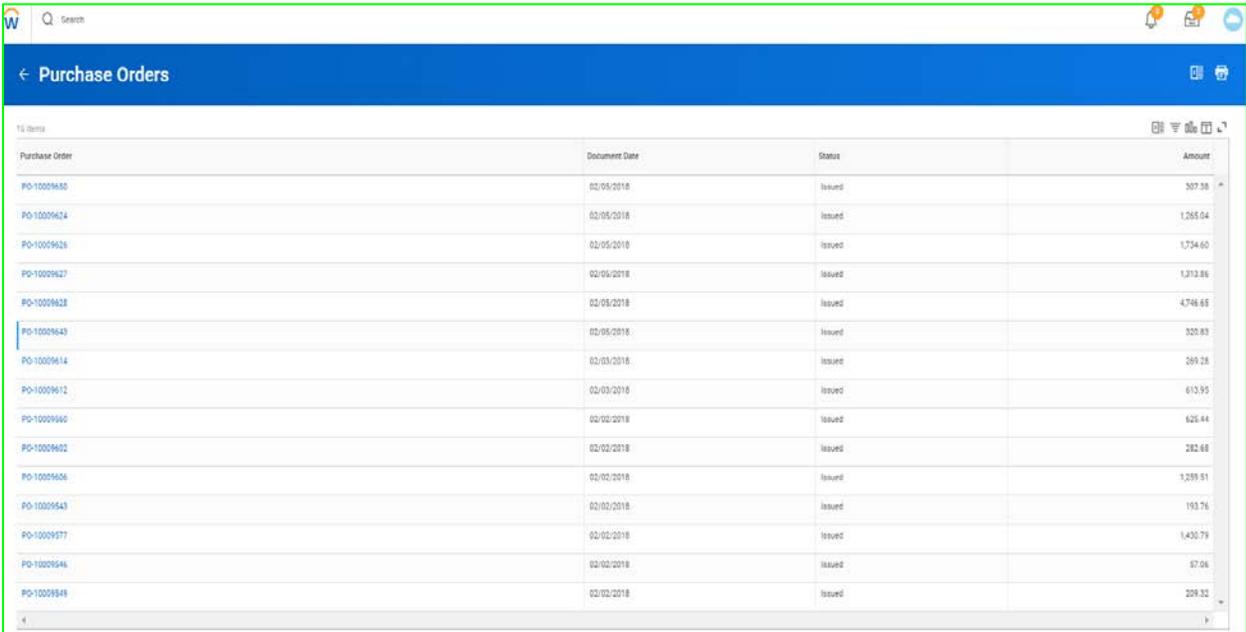
Document Date On or After: 05/19/2018

Document Date On or Before: MM/DD/YYYY

Purchase Order:

OK Cancel

Below is an example of the results for a search based on date.



W Search

Purchase Orders

19 items

Purchase Order	Document Date	Status	Amount
PO-10009650	02/05/2018	Issued	307.38
PO-10009624	02/05/2018	Issued	1,265.04
PO-10009626	02/05/2018	Issued	1,734.60
PO-10009627	02/05/2018	Issued	1,313.86
PO-10009628	02/05/2018	Issued	4,746.65
PO-10009643	02/05/2018	Issued	320.83
PO-10009614	02/03/2018	Issued	269.28
PO-10009612	02/03/2018	Issued	613.95
PO-10009640	02/02/2018	Issued	625.44
PO-10009602	02/02/2018	Issued	282.68
PO-10009606	02/02/2018	Issued	1,259.51
PO-10009543	02/02/2018	Issued	193.76
PO-10009577	02/02/2018	Issued	1,430.79
PO-10009546	02/02/2018	Issued	57.06
PO-10009849	02/02/2018	Issued	209.32

To view the purchase order details, click the purchase order number (in blue text). Below is an example of the results.

Search

View Purchase Order

Purchase Order PO-10001650 PO Number PO-10001650

Summary

Company: Cleveland Metropolitan School District

Document Date: 02/05/2019

Supplier: Office Depot - Acct. 10790065

Payment Terms: Net 30

Due Date: (empty)

Currency: USD

Total Amount: 307.38

Requisition Type: Regular

Contact Information

Issue Option: XML Auto

Buyer: Lyncolyn Parks (501389)

Buyer Email: Lyncolyn.Parks@clevelandmetroschools.org

Bill To Contact: Lyncolyn Parks (501389)

Bill To Contact Detail: Lyncolyn Parks (501389)

Bill To Contact Email: Lyncolyn.Parks@clevelandmetroschools.org

Billing Address: 1111 Superior Avenue E

Ship To Contact: Nilda L. Mendoza (499384)

Ship To Contact Email: Nilda.L.Mendoza@clevelandmetroschools.org

Shipping Address: 1701 Castle Avenue Cleveland, OH 44113 United States of America

Items: 1 item

Goods Order Line	Line	Item and Category	Supplier Item Identifier	Tax	Tax Recoverability	Quantity	Cost	Delivery	Retention	Prepaid	Ship To Address
1	1	Item	500609	Tax Applicability		Ordered: 1 Received: 1 Invoiced: 0	Unit of Measure: Each Unit Cost: 153.69 Extended Amount: 207.28	Due Date Lead Time			1701 Castle Ave OH 44113 Liv, America
		Item Description: Dell(TM) M1120 Return Program Black Toner Cartridge		Tax Code							
		Special Category: 11200 Office Supplies									

POs and Catalogs Application

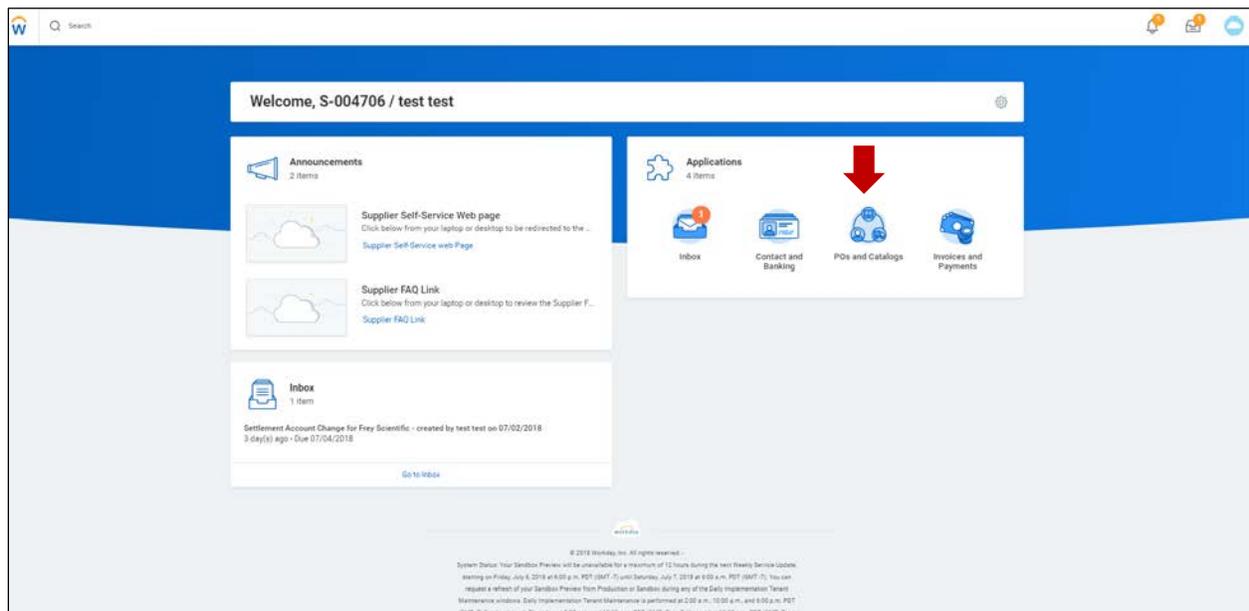
Purpose: To provide instructions for viewing and searching most recent invoices and payments.

How to Access: Log into the Supplier Self Service Portal and click **POs and Catalogs** under the Applications section of the home page.

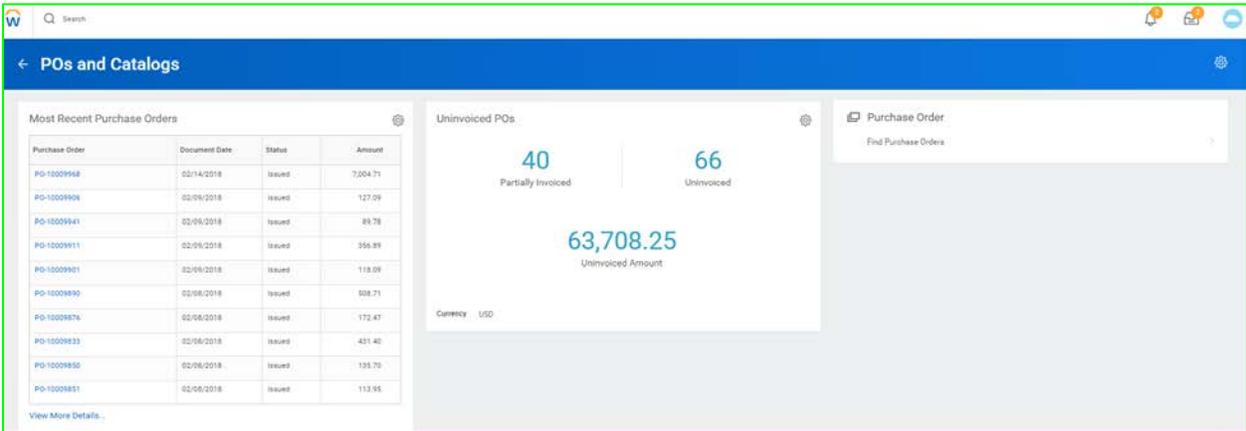
Audience: CMSD Approved Suppliers

Helpful Hints: Clicking on the [blue](#) text on any screen will return additional information.

Procedure: Follow the steps below to view and search PO and catalog items.



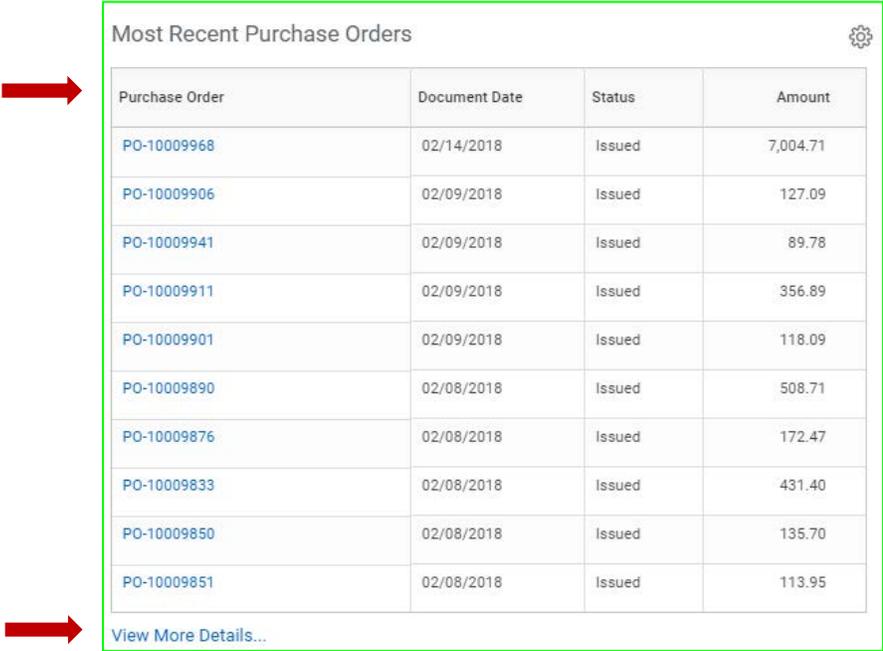
The **POs and Catalogs** application allows you to view your most recent purchase orders, view uninvoiced POs, and find purchase orders. Details include purchase order status, date, and amount, number of invoiced and partially invoiced POs, and amount of uninvoiced POs.



Viewing information for POs and Catalogs is very similar to viewing information for Invoices and Payments.

Most Recent Purchase Orders

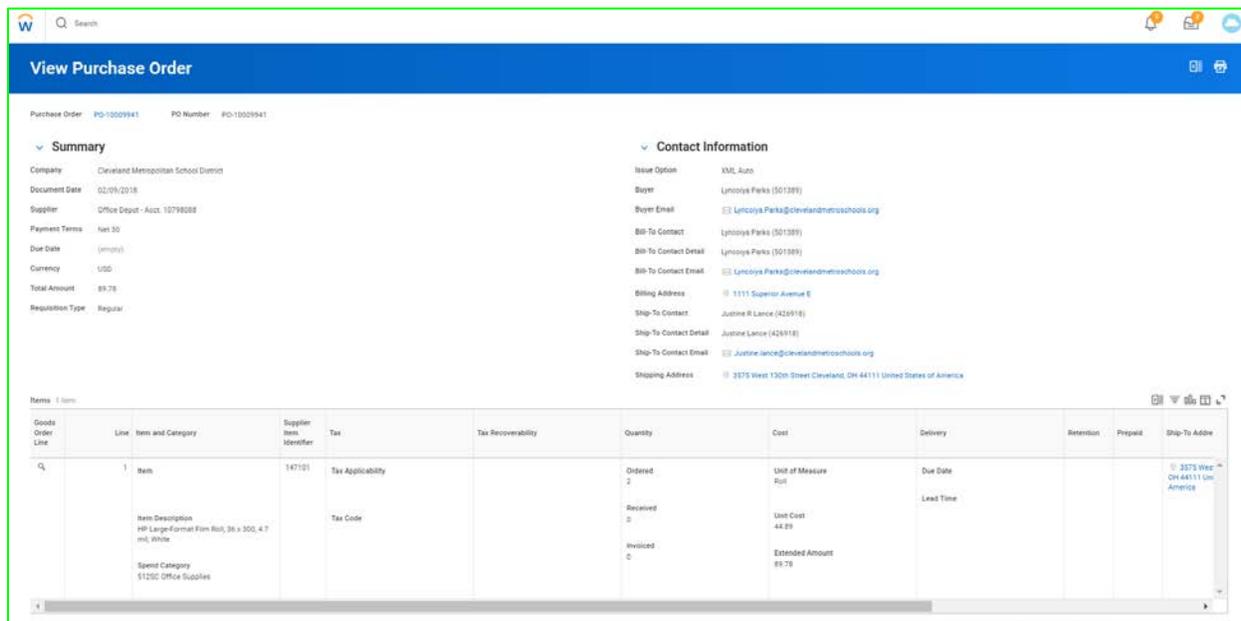
To view a purchase order, click the PO number in the first column.



Purchase Order	Document Date	Status	Amount
PO-10009968	02/14/2018	Issued	7,004.71
PO-10009906	02/09/2018	Issued	127.09
PO-10009941	02/09/2018	Issued	89.78
PO-10009911	02/09/2018	Issued	356.89
PO-10009901	02/09/2018	Issued	118.09
PO-10009890	02/08/2018	Issued	508.71
PO-10009876	02/08/2018	Issued	172.47
PO-10009833	02/08/2018	Issued	431.40
PO-10009850	02/08/2018	Issued	135.70
PO-10009851	02/08/2018	Issued	113.95

[View More Details...](#)

A sample report is shown below.



View Purchase Order

Purchase Order: PO-1002941 PO Number: PO-1002941

Summary

Company: Cleveland Metropolitan School District
 Document Date: 02/09/2018
 Supplier: Office Depot - Auct. 10798088
 Payment Terms: Net 30
 Due Date: (empty)
 Currency: USD
 Total Amount: 89.78
 Requisition Type: Regular

Contact Information

Issue Option: XML Auto
 Buyer: Lynsija Parks (501389)
 Buyer Email: Lynsija.Parks@clevelandmetroschools.org
 Bill-To Contact: Lynsija Parks (501389)
 Bill-To Contact Detail: Lynsija Parks (501389)
 Bill-To Contact Email: Lynsija.Parks@clevelandmetroschools.org
 Billing Address: 1111 Superior Avenue E
 Ship-To Contact: Justine R Lance (429918)
 Ship-To Contact Detail: Justine Lance (429918)
 Ship-To Contact Email: Justine.lance@clevelandmetroschools.org
 Shipping Address: 3375 West 130th Street Cleveland, OH 44111 United States of America

Items | 1 item

Goods Order Line	Line	Item and Category	Supplier Item Identifier	Tax	Tax Recoverability	Quantity	Cost	Delivery	Retention	Prepaid	Ship-To Address
1	1	Item	147101	Tax Applicability		Ordered: 2 Received: 0 Invoiced: 0	Unit of Measure: Roll Unit Cost: 44.89 Extended Amount: 89.78	Due Date Lead Time			3375 West 130th Street Cleveland, OH 44111 United States of America

If the purchase order you seek is not listed, click **View More Details** to launch the search box. To search box below should appear. You may search by date or by PO number.



Find Purchase Orders for Supplier Contact

Document Date On or After: 02/19/2018

Document Date On or Before: MM / DD / YYYY

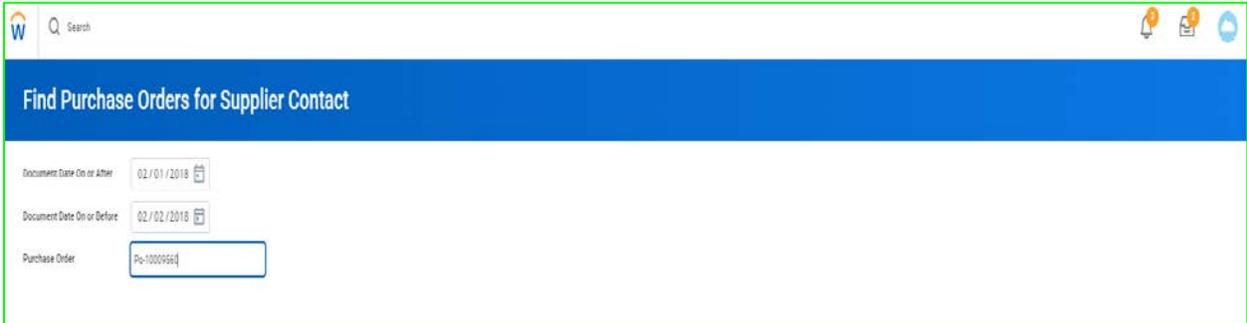
Purchase Order:

OK **Cancel**

To perform a search, enter your search criteria and click **OK** to continue or **Cancel** to stop the search.

Helpful Hint: You must make sure to enter the correct date range when searching for a specific purchase order, otherwise you will not get results.

Below is an example of the search criteria for PO 10009560. Please note the date fields have been populated with a date range that coincides with the purchase order date.



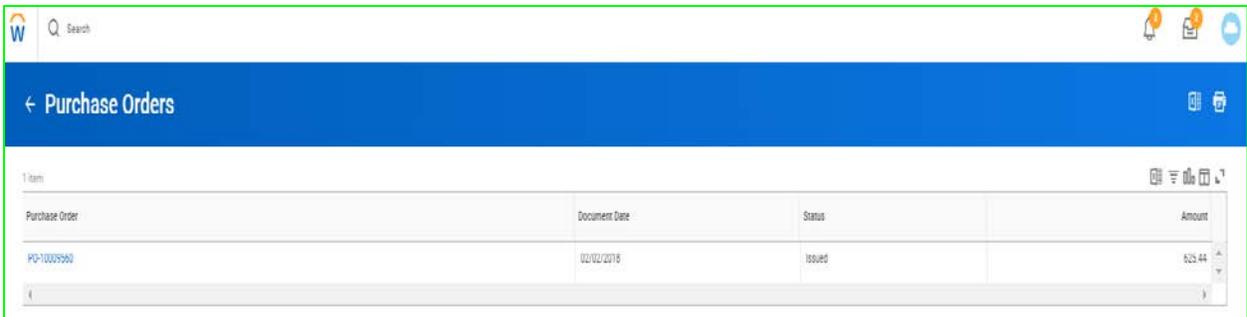
Find Purchase Orders for Supplier Contact

Document Date On or After: 02/01/2018

Document Date On or Before: 02/02/2018

Purchase Order: PO-10009560

Following is the result. Click the PO number (in blue) to see the details.



← Purchase Orders

1 Item

Purchase Order	Document Date	Status	Amount
PO-10009560	02/02/2018	Issued	525.44

Following is a sample of the report you will see. You can scroll up and down (right side of the report) or left and right (bottom of the report) to view the full report. You can also export to Excel.

View Purchase Order

Purchase Order PO-10009560 PO Number PO-10009560

Summary

Company Cleveland Metropolitan School District

Document Date 02/02/2018

Supplier Office Depot - Acct: 10794068

Payment Terms Net 30

Due Date (none)

Currency USD

Total Amount 835.44

Requisition Type Regular

Contact Information

Issue Option XOL Auto

Buyer Lyncoiya Parks (501395)

Buyer Email Lyncoiya.Parks@clevelandmetroschools.org

Bill-To Contact Lyncoiya Parks (501395)

Bill-To Contact Detail Lyncoiya Parks (501395)

Bill-To Contact Email Lyncoiya.Parks@clevelandmetroschools.org

Billing Address 1111 Superior Avenue E

Ship-To Contact Elizabeth Williamson (422881)

Ship-To Contact Detail Elizabeth Williamson (422881)

Ship-To Contact Email Elizabeth.williamson@clevelandmetroschools.org

Shipping Address 9300 Quince Avenue Cleveland, OH 44106 United States of America

Items: 11 items

Goods Order Line	Line	Item and Category	Supplier Item Identifier	Tax	Tax Recoverability	Quantity	Cost	Delivery	Extension	Prepaid	Ship-To Address
Q1	1	Item	416161	Tax Applicability		Ordered 1	Unit of Measure Each	Due Date			9300 Quince Avenue Unit America
		Item Description Cuisinart PrecisionChef Bowl Digital Kitchen Scale		Tax Code		Received 0	Unit Cost 36.39	Lead Time			
		Spend Category 6119C Classroom Supplies				Invoiced 0	Extended Amount 26.29				
Q1	2	Item	553197	Tax Applicability		Ordered 2	Unit of Measure Each	Due Date			9300 Quince Avenue Unit America
						Received		Lead Time			

Uninvoiced POs

This feature allows you to view partially invoiced POs and uninvoiced POs while providing the uninvoiced amount. Clicking on any of the blue text allows you to: view details, export to Excel, or export to a PDF.

Uninvoiced POs ⚙️

14

Partially Invoiced

7

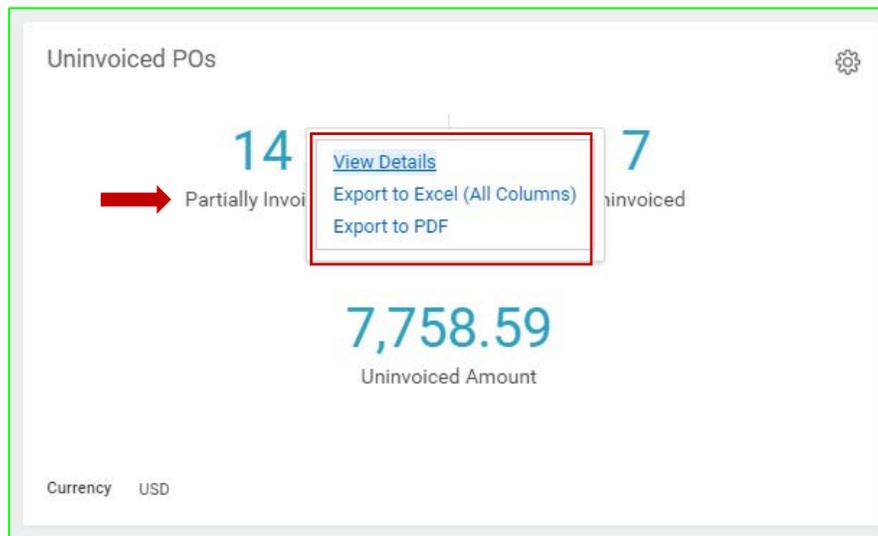
Uninvoiced

7,758.59

Uninvoiced Amount

Currency USD

To illustrate this functionality, we will use the **Partially Invoiced** field. The example below shows the menu options for Uninvoiced Amount and the resulting reports that are generated.



Helpful Hint: While the menu options are different (View Details, Export to Excel, Export to PDF) for Partially Invoiced, the resulting reports will return the same information (PO#, document date, status, uninvoiced amount, and currency).

Sample Results: View Details

As shown in the upper right corner of the following report, tools are available to allow you to customize the report to fit your needs. Options include print, export to excel, filter, and create graphs.

[View Details](#)

To view the details, click any of the [blue fields](#) as shown above to pull up the menu. Click [View Details](#) on the menu to display the detailed report (see example on the next page).

14 items



Purchase Order	Document Date	Status	Uninvoiced Amount	Currency
PO-0524094	05/10/2017	Issued	36.99	USD
PO-0524759	05/16/2017	Issued	29.98	USD
PO-0525142	05/18/2017	Issued	559.94	USD
PO-0525153	05/18/2017	Issued	72.15	USD
PO-0526126	05/25/2017	Issued	2,212.19	USD
PO-0526342	05/26/2017	Issued	614.70	USD
PO-0527988	05/31/2017	Issued	1,799.90	USD
PO-10001647	08/16/2017	Issued	20.99	USD
PO-10002020	08/24/2017	Issued	35.96	USD
PO-10005646	11/02/2017	Issued	13.74	USD
PO-10006050	11/13/2017	Issued	126.30	USD
PO-10007939	12/21/2017	Issued	271.00	USD
PO-10009064	01/25/2018	Issued	23.29	USD
PO-10009393	01/31/2018	Issued	396.61	USD

Export to Excel



To export a file to Excel, click the  icon in the upper right corner of the data table (see above) or click [Export to Excel \(All Columns\)](#) as shown on the previous page. The Excel file will appear in the bottom left corner of the screen. Double click the file to open it.

Sample Results: Export to Excel

If you want to edit the Excel file, click  once the file has downloaded. See example on the next page.

Details_View (1) [Protected View] - Excel

File Home Insert Page Layout Formulas Data Review View Templates Tell me what you want to do...

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. [Enable Editing](#)

B32

	A	B	C	D	E
1	Purchase Order	Document Date	Status	Uninvoiced Amount	Currency
2	PO-0524094	5/10/2017	Issued	36.99	USD
3	PO-0524759	5/16/2017	Issued	29.98	USD
4	PO-0525142	5/18/2017	Issued	559.94	USD
5	PO-0525153	5/18/2017	Issued	72.15	USD
6	PO-0526126	5/25/2017	Issued	2,212.19	USD
7	PO-0526342	5/26/2017	Issued	614.70	USD
8	PO-0527988	5/31/2017	Issued	1,799.90	USD
9	PO-10001647	8/16/2017	Issued	20.99	USD
10	PO-10002020	8/24/2017	Issued	35.96	USD
11	PO-10005646	11/2/2017	Issued	13.74	USD
12	PO-10006050	11/13/2017	Issued	126.30	USD
13	PO-10007939	12/21/2017	Issued	271.00	USD
14	PO-10009064	1/25/2018	Issued	23.29	USD
15	PO-10009393	1/31/2018	Issued	396.61	USD

Export to PDF

If you prefer to export the Partially Invoiced POs to a PDF file, choose the [Export to PDF](#) option.

Uninvoiced POs

14 Partially Invoiced 7 Invoiced

7,758.59 Uninvoiced Amount

Currency USD

[View Details](#)
[Export to Excel \(All Columns\)](#)
[Export to PDF](#)

The resulting PDF report is shown on the next page.

Sample Results: Export to PDF

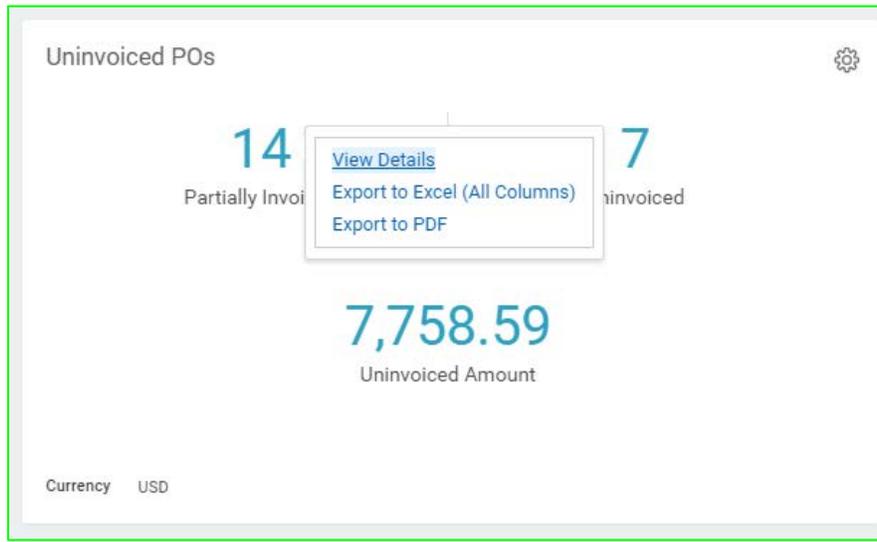


Details View

10:48 AM
06/20/2018
Page 1 of 1

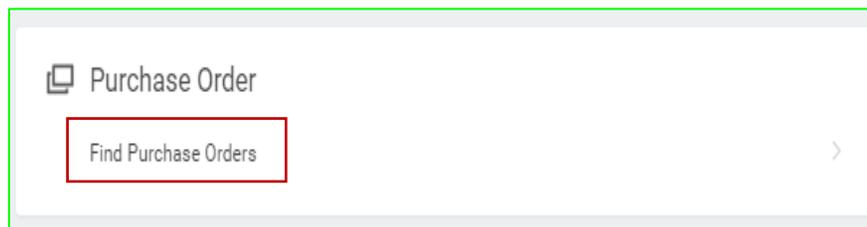
Purchase Order	Document Date	Status	Uninvoiced Amount	Currency
PO-0524094	05/10/2017	Issued	36.99	USD
PO-0524759	05/16/2017	Issued	29.98	USD
PO-0525142	05/18/2017	Issued	559.94	USD
PO-0525153	05/18/2017	Issued	72.15	USD
PO-0526126	05/25/2017	Issued	2,212.19	USD
PO-0526342	05/26/2017	Issued	614.70	USD
PO-0527988	05/31/2017	Issued	1,799.90	USD
PO-10001647	08/16/2017	Issued	20.99	USD
PO-10002020	08/24/2017	Issued	35.96	USD
PO-10005646	11/02/2017	Issued	13.74	USD
PO-10006050	11/13/2017	Issued	126.30	USD
PO-10007939	12/21/2017	Issued	271.00	USD
PO-10009064	01/25/2018	Issued	23.29	USD
PO-10009393	01/31/2018	Issued	396.61	USD

Helpful Hint: The [View Details](#), [Export to Excel](#) and [Export to PDF](#) menu options shown below for Partially Invoiced, can also be used to display additional information for Uninvoiced and Uninvoiced Amount.

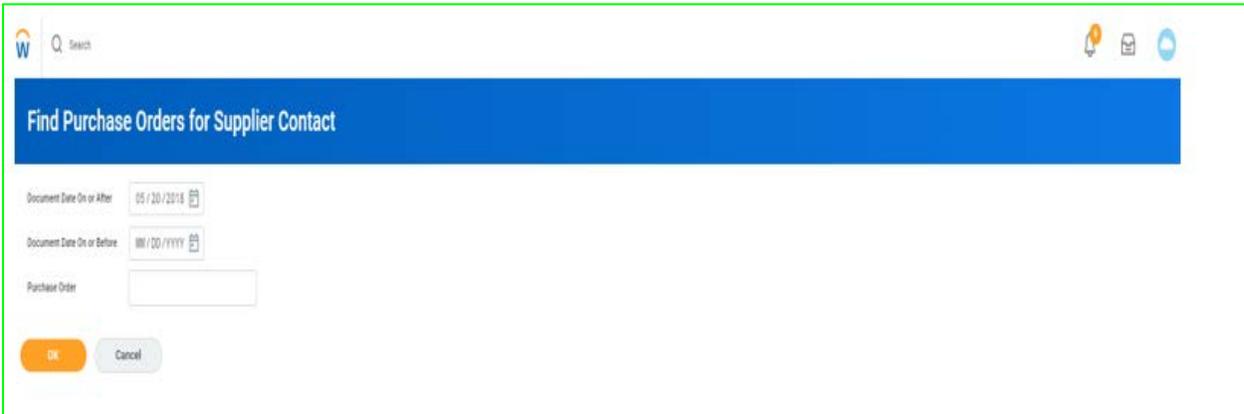


Purchase Orders

The Purchase Order option allows you to search for purchase orders by PO number and date. To activate the search, click **Find Purchase Orders**.



You will see the search criteria screen below. You can search by date range or by PO number.



W Search

Find Purchase Orders for Supplier Contact

Document Date On or After 05/20/2018

Document Date On or Before MM/DD/YYYY

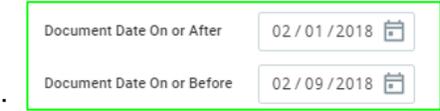
Purchase Order

OK Cancel

Helpful Hint: If you search by PO number, be sure to enter a valid date range. If the date range does not coincide with the date of the PO, your search by PO will fail.

Search by Date Range

To search by date, enter the dates for purchase orders you'd like to see. In the example below we used the following dates.



Document Date On or After 02/01/2018

Document Date On or Before 02/09/2018



W Search

Find Purchase Orders for Supplier Contact

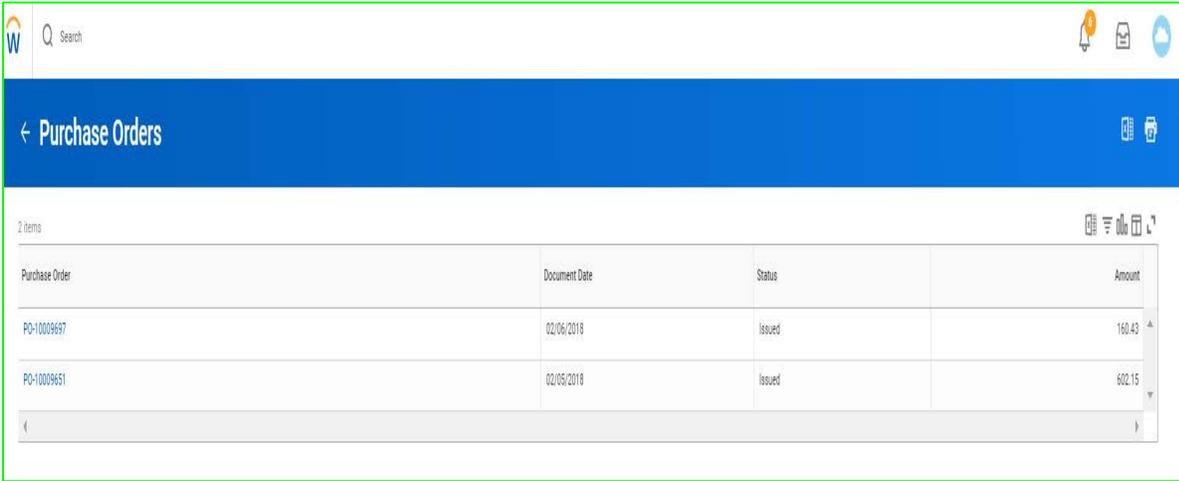
Document Date On or After 02/01/2018

Document Date On or Before 02/09/2018

Purchase Order

OK Cancel

Click to continue or to stop the search. Clicking returned the results below. We see two POs that were issued within the specified period.



Purchase Order	Document Date	Status	Amount
PO-10009697	02/06/2018	Issued	160.43
PO-10009651	02/05/2018	Issued	602.15

To view the purchase order details, click the Po number. We clicked the first PO on the list to generate the report below.

Search by Purchase Order Number Only

In this example we use a valid PO number but did not change the default date range.



Find Purchase Orders for Supplier Contact

Document Date On or After: 05/20/2018

Document Date On or Before: MM/DD/YYYY

Purchase Order: PO-10009651

OK Cancel

While the PO number was valid, the date range was not (05/20/2018-MM/DD/YYYY). As a result, the purchase order search failed (see below).



Purchase Orders

0 Items

Purchase Order	Version	Document Date	Status	Amount
No Data				

Search for a Specific PO within a Specific Date Range

In this example we will perform a search using a valid PO number (PO-10009651) and a valid date range (02/01/2018 – 02/10/2018).



Find Purchase Orders for Supplier Contact

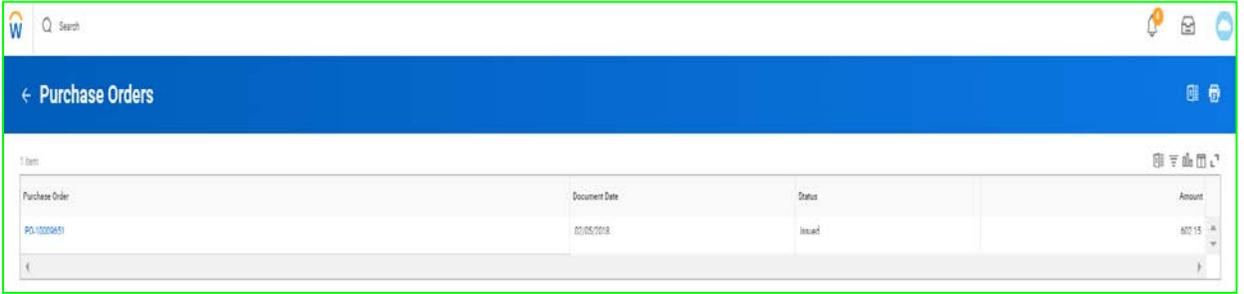
Document Date On or After: 02/01/2018

Document Date On or Before: 02/10/2018

Purchase Order: PO-10209651

OK Cancel

Because we used a valid search criteria, the purchase order search returned the PO we were looking for (see below).



← Purchase Orders

1 item

Purchase Order	Document Date	Status	Amount
PO-10209651	02/05/2018	Issued	602.15

Clicking the PO number (in blue) allows us to view the PO details (see below).

View Purchase Order

Purchase Order: PG-1000951 PO Number: PG-1000951

Summary		Contact Information	
Company	Cleveland Metropolitan School District	Issue Option	Print
Document Date	02/05/2018	Buyer	Pauline Reid (J98240)
Supplier	Staples Contract & Commercial Customer Id: 1000000DT	Buyer Email	Pauline.reid@clevelandmetroschools.org
Payment Terms	Net 30	Bill-To Contact Detail	Pauline Reid
Due Date	(empty)	Billing Address	1111 Superior Avenue E
Currency	USD	Ship-To Contact Detail	Pauline Reid
Total Amount	632.18	Shipping Address	1442 Lakeside Avenue Cleveland, OH 44114 United States of America

Order Line	Line	Item and Category	Tax	Tax Recoverability	Quantity	Cost	Delivery	Retention	Prepaid	Ship-To Address	Ship-To Contact
Q1	1	Item	Tax Applicability		Ordered 8	Unit of Measure Dozen	Due Date			1442 Lakeside Avenue Cleveland, OH 44114 United States of America	
		Item Description	Tax Code		Received 5	Unit Cost 6.99	Lead Time				
		Dry erase markers fine black 1/2pk			Involved 8	Extended Amount 55.92					
		Special Category 3113C Classroom Supplies									
Q1	2	Item	Tax Applicability		Ordered 2	Unit of Measure Dozen	Due Date			1442 Lakeside Avenue Cleveland, OH 44114 United States of America	
		Item Description	Tax Code		Received 2	Unit Cost 25.95	Lead Time				
		Paper Mate Liquid paper 1/2pk			Involved 2	Extended Amount 51.92					
		Special Category 3113C Classroom Supplies									

Search by Date Range Only

In most cases, date range searches are used for “open” searches. Open searches are used to identify all open purchase orders for a specific period of time. In this case, the date range used for the search will be: 02/01/2018-02/15/2018.

Find Purchase Orders for Supplier Contact

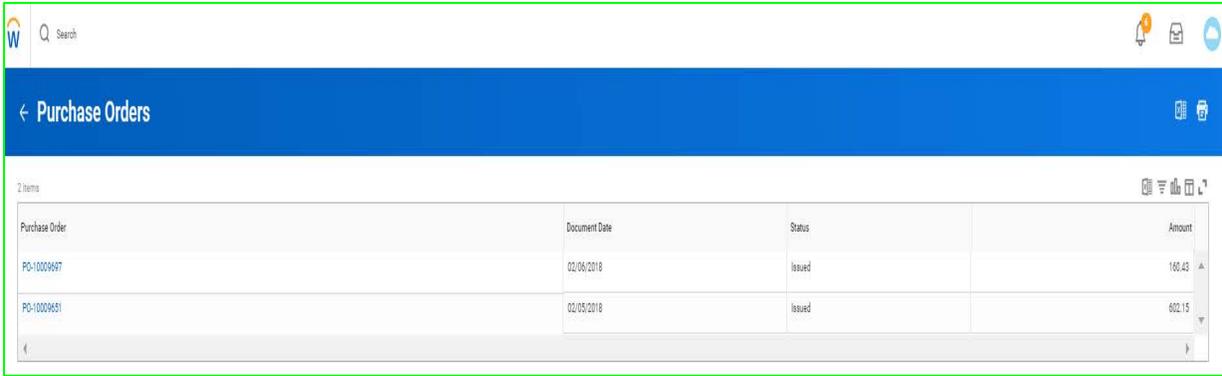
Document Date On or After: 02/01/2018

Document Date On or Before: 02/15/2018

Purchase Order:

OK Cancel

The search by date range (02/01/2018-02/15/2018) returned the results below.



Purchase Order	Document Date	Status	Amount
PO-1000997	02/06/2018	Issued	160.43
PO-1000961	02/05/2018	Issued	602.15

Training Notes

